Results 2015

User Manual

Table of Contents

Table of Figures

System Overview

Accessing Results

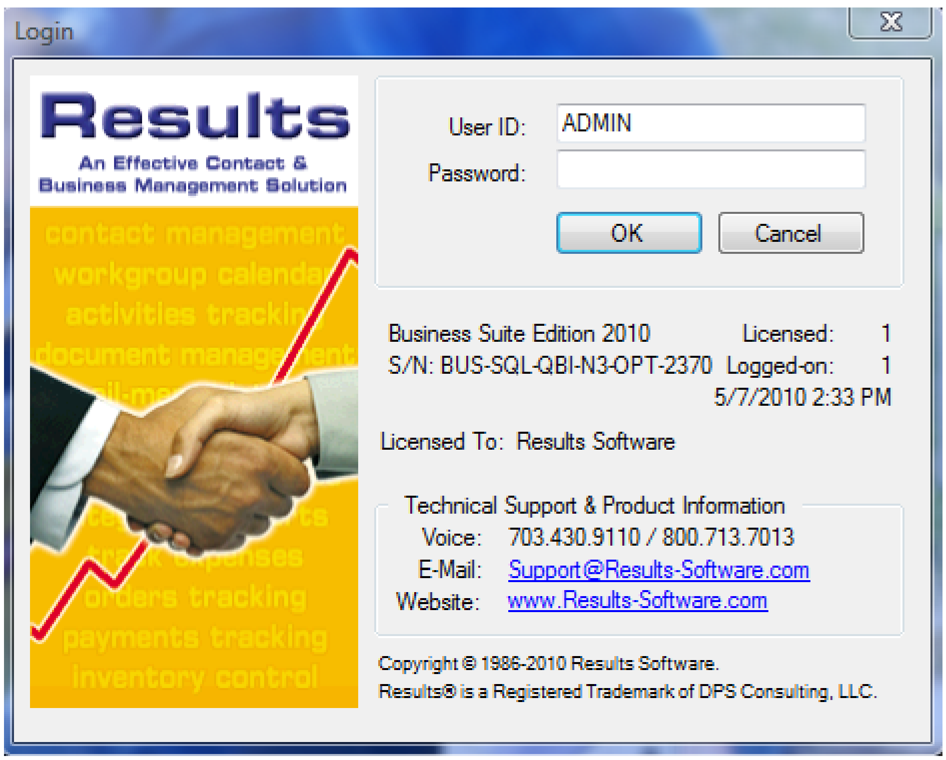
When Results is installed, two icons will appear on your desktop. One icon will provide access to a demo database that contains sample records; the other icon will provide access to an empty database where you can start entering real company information.

To open Results:

1. Click the Results icon on your desktop: 

2. When the login screen appears, type your User ID and the Password. Click OK to continue.

Figure 1: Results Login Screen

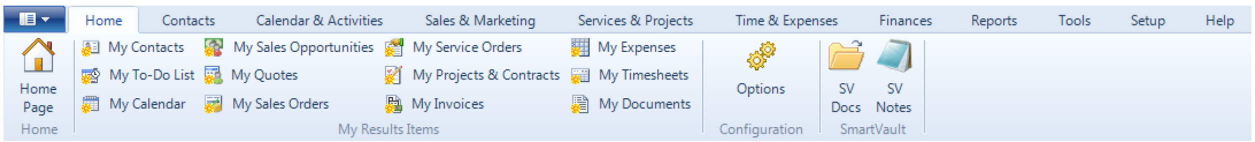


Note: If the software was recently installed, Login into Results with the User ID "ADMIN" (and leave the Password blank), until you change the security settings and add users.

Product Navigation

The ribbon at the top of application serves as the Main Menu, allowing users to navigate to different modules within the software.

Figure 2: Ribbon Menu

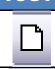
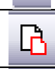
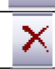
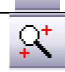
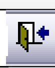


Items under the Home Menu option will default to display information specific to the logged in user. All other menu items will display general company information but can be filtered as desired.

Screen Icons

The following icons will appear at the top of most detail or data entry screens within Results.

Figure 3: Screen Icons

Icon	Description
	Add a new record.
	Copy or replicate the record.
	Saves the record.
	Cancels changes.
	Deletes record.
	Refreshes or redisplays the record
	Perform an additional Named search within the listed records
	Accesses Ad-Hoc Reports.
	Prints Form or Screen
	Accesses the Reports
SV Docs	Attach and View SmartVault Docs
SV Notes	Enter and View SmartVault Notes
	Closes the current screen.
	Help or User Manual

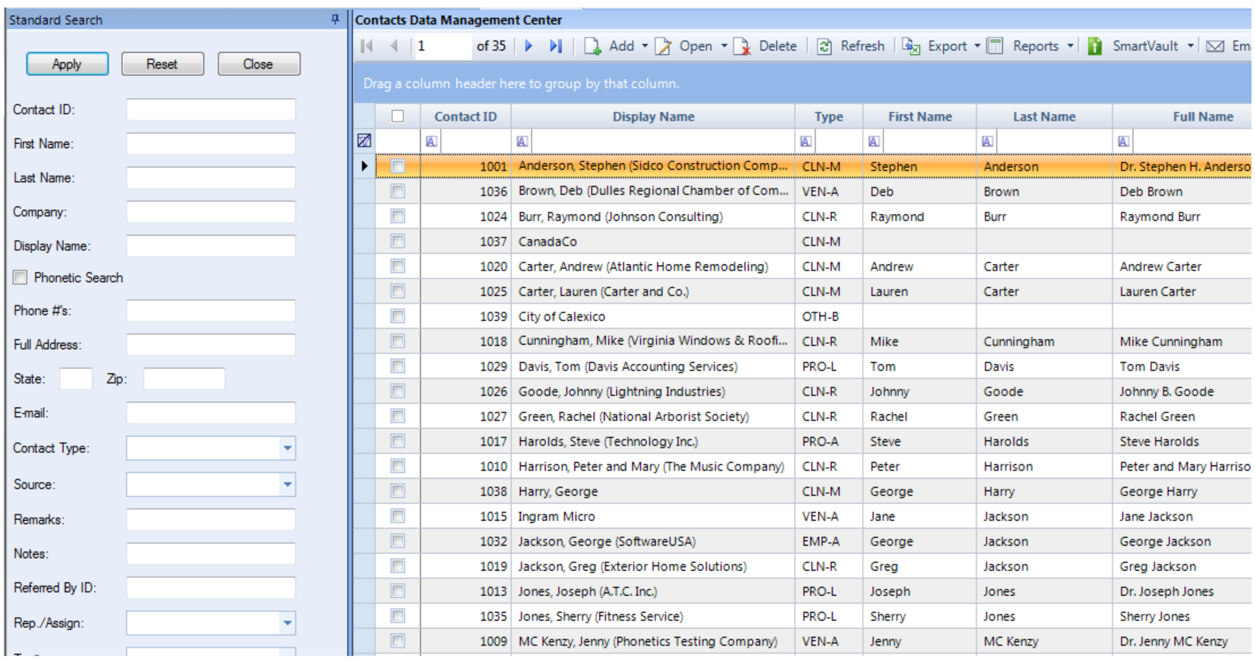
Data Management Centers

Overview of the Data Management Centers

Each module within Results features a Data Management Center (DMC). DMCs allow users to search, view, sort, and group information relevant to each module.

DMCs can be accessed by choosing the various “Manage” icons available within the main menu. The following screen displays the Contacts Data Management Center.

Figure 4: Data Management Center



Results features the following Data Management Centers:

- Contacts
- Activities
- Sales Opportunities
- Quotes
- Sales Orders
- Documents

- Service Orders
- Projects & Contracts
- Expenses
- Invoices
- Payments
- Products & Pricing
- Purchase Orders

Conducting a DMC Search

Each DMC will automatically list all relevant information. Users can conduct a search for relevant records in multiple ways.

From the Standard Search Tab:

1. Open a Data Management Center. For example, to open the Contacts DMC, on the **Contacts** tab, in the **Contacts** Group, and click **Manage**. The **Contacts Data Management Center** will appear.

2. Click the **Standard Search** tab.

3. Type in basic search criteria to filter your search. **Note:** You do not need to fill in all fields. If more than one field is filled, all search criteria will have to apply in the displayed records.

4. Click the **Apply** button. A list of records meeting your search criteria will appear.

5. Double click on the record you would like to open.

From a Column Heading:

1. Open a Data Management Center. For example, to open the Contacts DMC, on the **Contacts** tab, in the **Contacts** Group, and click **Manage**. The **Contacts Data Management Center** will appear.

2. Place your cursor in the cell directly below the column heading of the column(s) on which you want to search. Start typing the information you would like to view. As soon as you start typing, the DMC will automatically start filtering your data. For example, by typing "John" under the "First Name" column heading, you will see all contacts that are equal to or start with a first name of "John" (John, Johnny, etc.).

For more information on Column Heading searches, refer to *Filtering Search Results*.

Sorting Information in the DMC

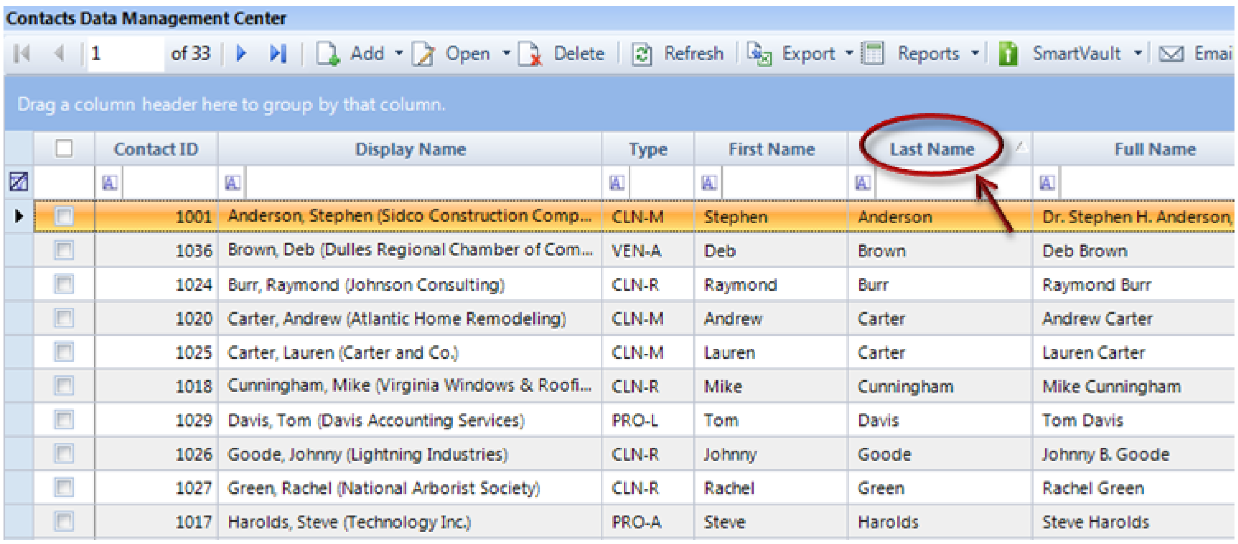
You can sort DMC search results by any column heading in either ascending or descending order.

Click the column heading once and a small up arrow appears to the right of the column heading. The DMC is sorted in ascending or chronological order by that field.

Click the column heading a second time and a small down arrow appears to the right of the column heading. The DMC is sorted in descending or reverse chronological order by that field.

The following figure shows data sorted by Last Name.

Figure 5: DMC Sorted by Last Name



Contact ID	Display Name	Type	First Name	Last Name	Full Name
1001	Anderson, Stephen (Sidco Construction Comp...	CLN-M	Stephen	Anderson	Dr. Stephen H. Anderson,
1036	Brown, Deb (Dulles Regional Chamber of Com...	VEN-A	Deb	Brown	Deb Brown
1024	Burr, Raymond (Johnson Consulting)	CLN-R	Raymond	Burr	Raymond Burr
1020	Carter, Andrew (Atlantic Home Remodeling)	CLN-M	Andrew	Carter	Andrew Carter
1025	Carter, Lauren (Carter and Co.)	CLN-M	Lauren	Carter	Lauren Carter
1018	Cunningham, Mike (Virginia Windows & Roofi...	CLN-R	Mike	Cunningham	Mike Cunningham
1029	Davis, Tom (Davis Accounting Services)	PRO-L	Tom	Davis	Tom Davis
1026	Goode, Johnny (Lightning Industries)	CLN-R	Johnny	Goode	Johnny B. Goode
1027	Green, Rachel (National Arborist Society)	CLN-R	Rachel	Green	Rachel Green
1017	Harolds, Steve (Technology Inc.)	PRO-A	Steve	Harolds	Steve Harolds

Sorting by Multiple Columns

To sort by more than one column in the DMC, hold the Shift key down while clicking on the column headings. For example, if you click the **State** column heading, hold the Shift key and click the **City** column heading, the DMC will list all the Cities in ascending order under each alphabetical state.

Clicking a column after you let go of the **Shift** key returns to a single column sort.

Adjusting the Columns in the DMC

Each user can customize the width and location of DMC columns. The layout will be preserved even after Results has been closed and re-opened.

1. Conduct a search within a Data Management Center. (Refer to *Conducting a DMC Search*.)

2. Place your cursor between the two columns that you wish to adjust until your cursor turns to a double arrow.

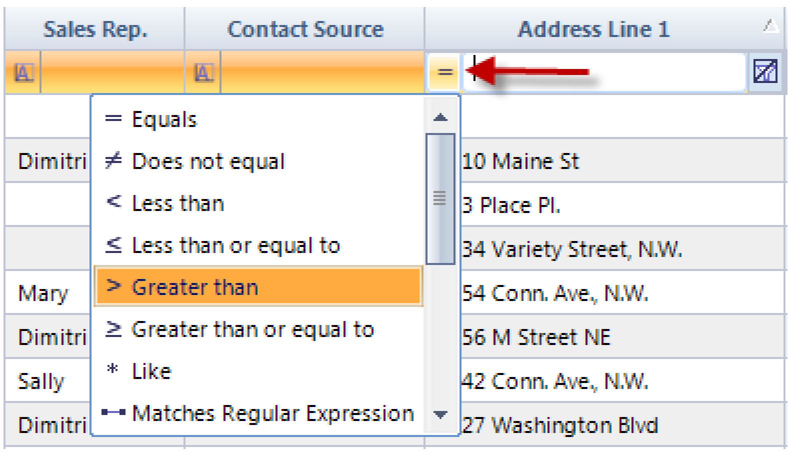
3. Click, drag, and adjust the column width as necessary or double click the column separator to automatically resize the columns.

Filtering Search Results

Filtering enables you to further refine your search by applying operators such as greater than, less than, like, or between to the columns displayed in the DMC. For example, in the Contacts DMC, you could search for records that contain the word "Drive" within their Address.

To see the filter menu, click on the left-hand icon in the cell underneath the column heading you'd like to use in your search. The current menu selection will be highlighted. The following figure shows the filter menu.

Figure 6: DMC Filter Menu



The following table describes the filter options.

DMC Filter Menu Options

Menu Option	Description
Equals	Displays all records with values equal to the value you enter in the selected column.
Does Not Equal	Displays all records with values that do not equal the value you enter in the selected column.
Less Than or Equal To	Displays all records with values less than or equal to the value you enter in the selected column.
Less Than	Displays all records with values less than the value you enter in the selected column.
Greater Than	Displays all records with values greater than the value you enter in the selected column.
Greater Than or Equal To	Displays all records with values greater than or equal to the value you enter in the selected column.
Like	Displays all records that include the value entered. This is used when the surrounding text might be unknown. For example, searching for LIKE "*Proposal*" will find "Requested a Proposal be sent." Note: For the Enterprise edition, use "%" instead "*" for the Global character."

Matches Regular Expression	Will do a regular expression comparison of the column's value to the comparison value taking comparison value as regular expression string.
Starts with	Displays all records with values that start with the value you enter in the selected column.
Contains	Displays all records with values that contain the value you enter in the selected column.
Ends with	Displays all records with values that end with the value you enter in the selected column.
Does not start with	Displays all records with values that do not start with the value you enter in the selected column.
Does not contain	Displays all records with values that do not contain the value you enter in the selected column.
Does not end with	Displays all records with values that do not end with the value you enter in the selected column.
Does not match	Displays all records with values that do not match the value you enter in the selected column.
Not like	Displays all records that do not include the value entered. This is used when the surrounding text might be unknown. For example, searching for Not LIKE "*Proposal*" will find all entries that do NOT have the word "proposal" anywhere in the text. Note: For the Enterprise edition, use "%" instead "*" for the Global character."

To Apply a Filter:

a. Perform a DMC search.

b. Enter your filter criteria below the column heading of the column(s) on which you want to apply the filter.

c. Click the left-hand filter icon to display the filter menu and select the operation you want to apply from the menu.

d. Apply additional filters in other columns as necessary.

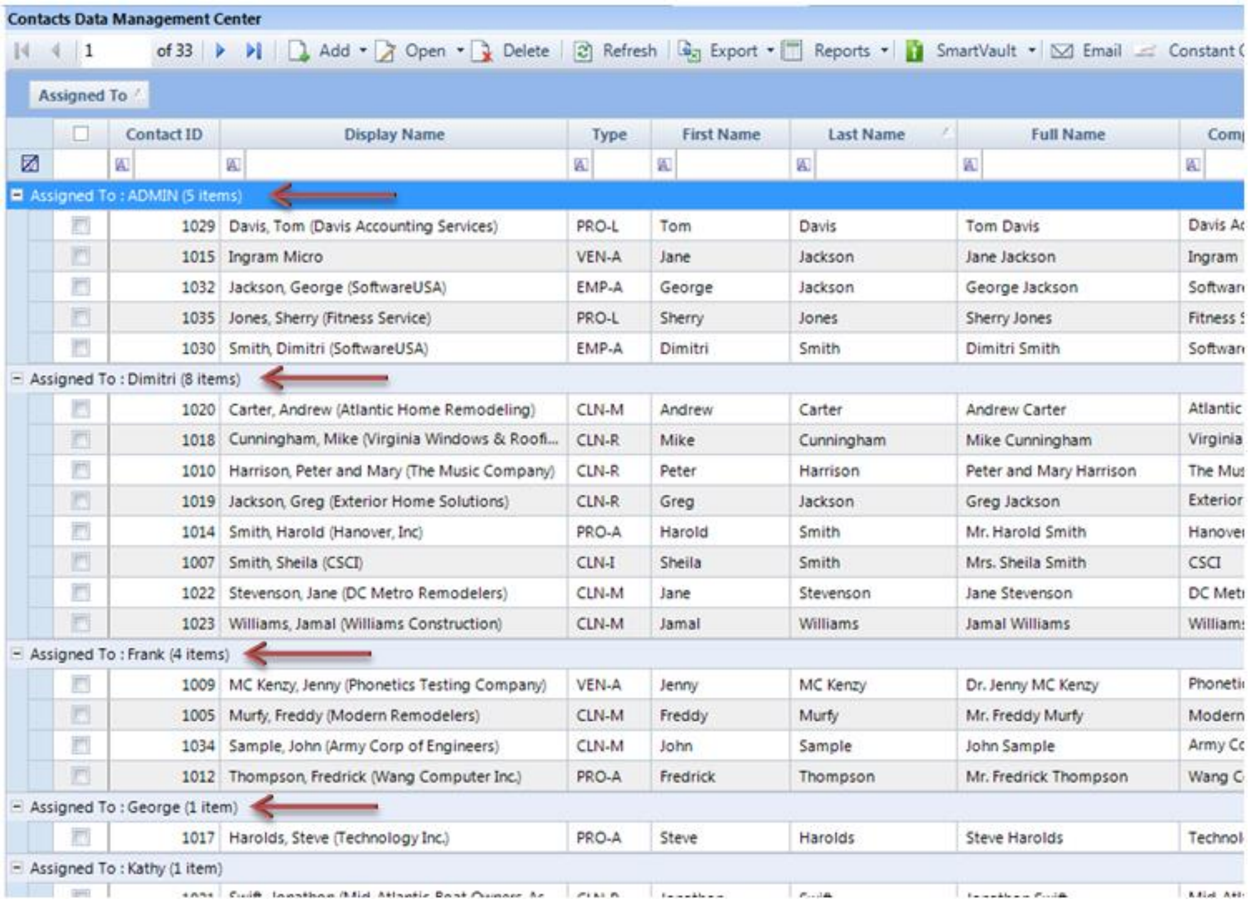
Note: To remove all filters, click the clear filter icon located in the far left column of the filter row. This icon will also appear on the right-hand side of a filter cell when you scroll over the cell with your mouse.

Grouping Search Results

DMC search results can be grouped by any of the fields displayed in the column headings. For example, if you were performing a search in the Contacts DMC, you could group by "Contact Type" or "Assigned To".

The following figure shows the results of Contacts DMC search grouped by “Assigned To”.

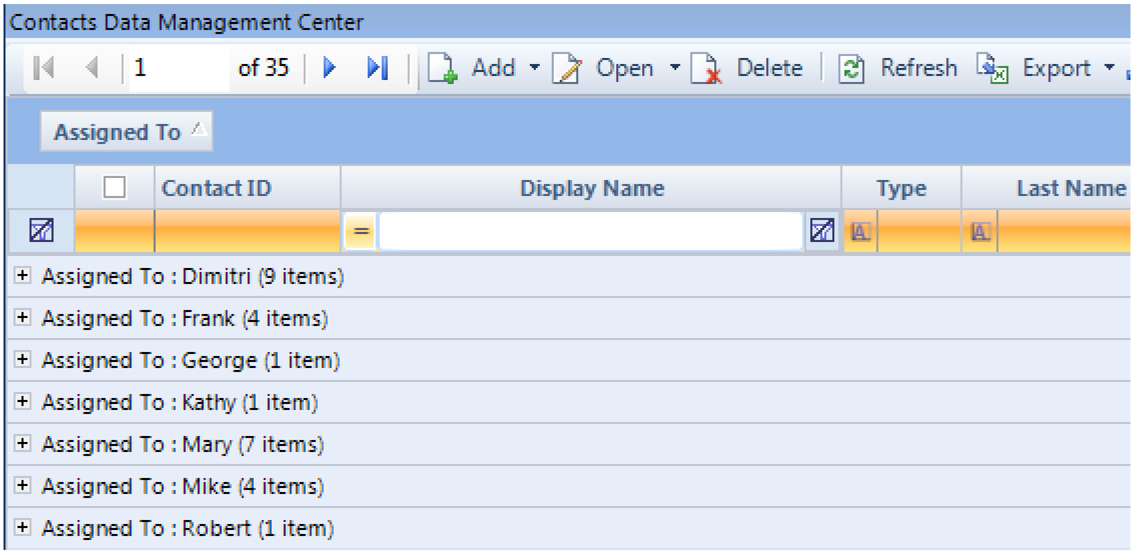
Figure 7: DMC Search with Search Results Grouped



You can collapse or expand the view of the records associated with each group by clicking on the icon ⊞ in the left of the column.

The following figure shows the results of Contacts DMC search grouped by “Assigned To” with each row collapsed.

Figure 8: DMC Search with Search Results Grouped (Rows Collapsed)

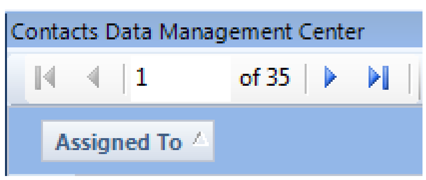


To Group Search Results:

a. Perform a DMC search.

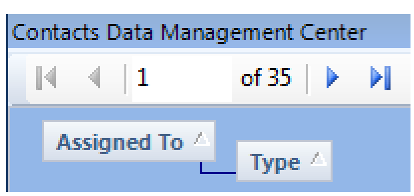
b. Determine column header you want to use to group your search results. Drag the column header to the light blue area at the top of the DMC that reads: "Drag a column header here to group by that column."

Figure 9: DMC with Column Header Selected for Grouping



c. To further group your search results, repeat the previous step as necessary.

Figure 10: DMC with Two Column Headers Selected for Grouping



d. To collapse the rows displayed under each group, click the minus icon.

e. To return to the original display, click **Refresh** button in the DMC menu.

Tips for Conducting DMC Searches

Tip 1: To search for a list of Contact IDs, enter a list of ID's separated by commas (1234, 2345).

Tip 2: To search for a range of Contact ID's, enter the range indicated by a colon (1111:2222).

Tip 3: The Address field in the Contacts DMC allows you to search on any portion of the Address Line 1, Address Line 2, City, State, Zip and Country fields.

Tip 4: The following characters can be used in the Standard Search fields:

Search Character	Search Results
%	Any string composed of zero or more characters **Example:** Entering "%" in the email standard search field will return all records with a blank email address.
_ (underscore)	Any single character **Example:** Entering "_" in the email standard search field will return all records that have at least one character in that field.
[ ]	Any single character matching the specified set or range. **Example:** Entering "[ab]" in the email standard search field will return all email addresses starting with "a" or "b".
[^]	Any single character not matching the specified set or range. **Example:** Entering "[^ab]" in the email standard search field will return all email addresses that do NOT start with "a" or "b".

Exporting DMC Data

You can export the DMC search results into an Excel or PDF file.

To Export the DMC:

a. Perform a DMC search.

b. To Export to Excel, click the **Export** button at the top of the DMC screen.

   OR

   To Export to a PDF, click the arrow next to the **Export** button. A secondary menu displays. Select **Export to PDF**.

Figure 11: Selecting Export Options in the DMC

c. The **Save As** dialog box will open. Select the folder that you would like to save your file to and give your file a name. Click **Save.**

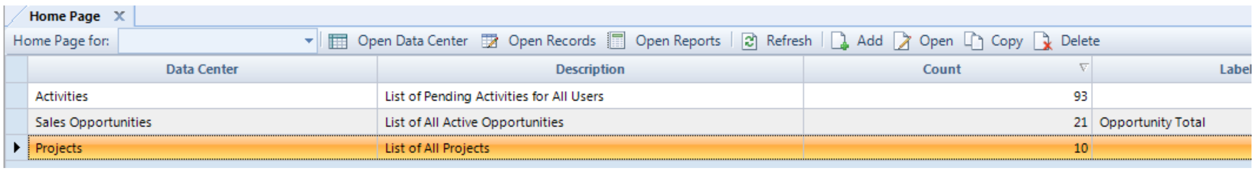
d. The exported file will open in the format you selected from the dropdown.

The Home Page

The Home Page shows each user a customized view of job-related information. To display your Home Page, on the **Home** tab, in the **Home** group, click **Home Page**.

The list of your selected Named Searches will display here.

Figure 12: Home Page



Each item on the list will open a DMC and display the records for that search.

How to Add Items to Your Home Page

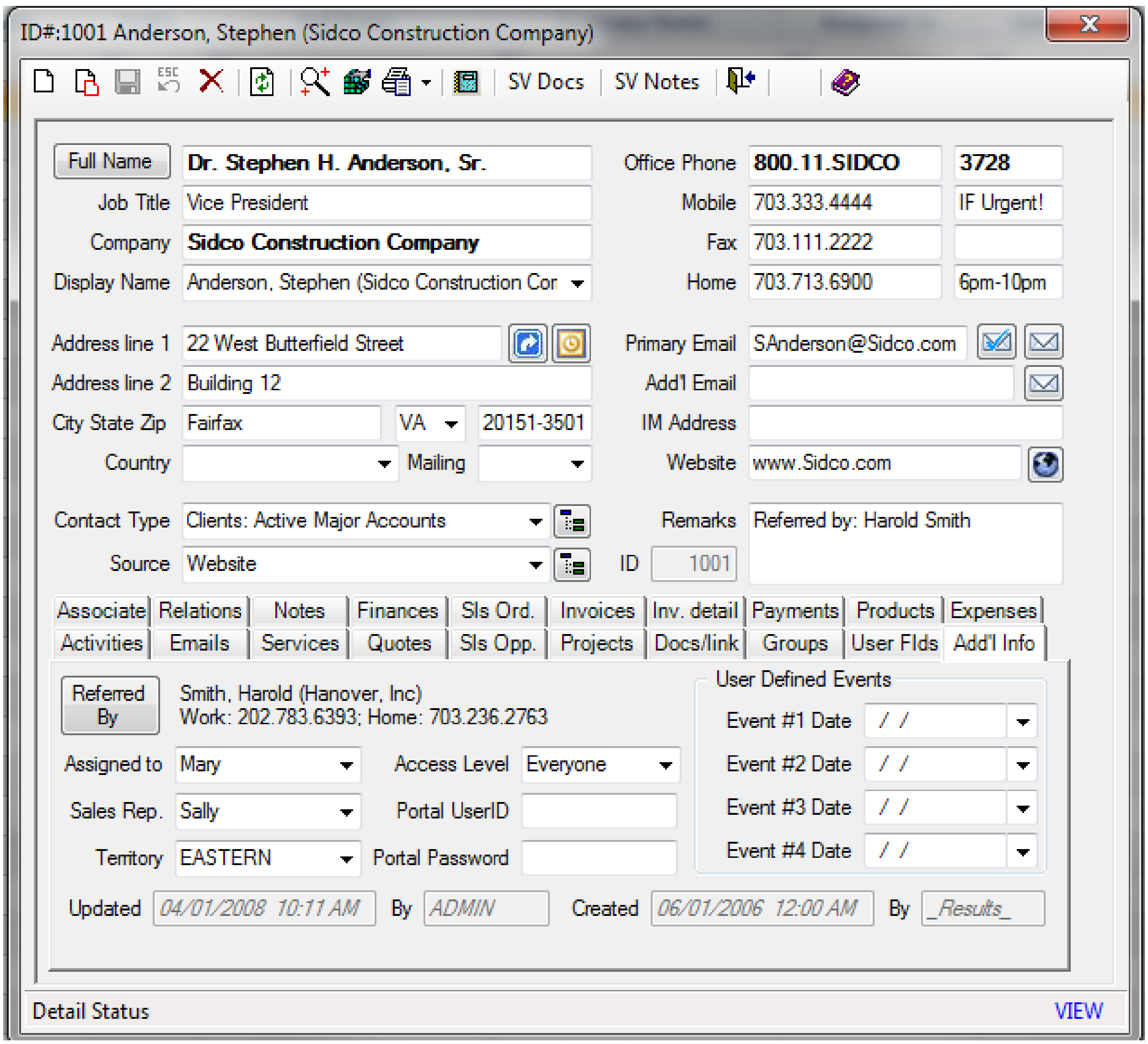
Refer to the section on *Named Searches*.

Contacts

The contacts screen offers a central place to see all the aspects of your relationship with your customers, prospects, employees, and vendors. In addition to basic contact information, you can also see all activities, opportunities, invoices, payments, etc. that are associated with each account.

The figure below displays a contact screen for Dr. Anderson with Sidco Construction.

Figure 13: Contacts Screen



Tab Name	What does it show about the contact?
Activities	Past or future appointments, meetings, and tasks.
Emails	Incoming or outgoing emails from the account.
Services	Past or future Service Orders.
Quotes	Associated Quotes.
Sls Opp.	Associated Sales Opportunities.
Projects	Associated Projects or Contracts.
Docs/Link	Associated documents and files such as proposals, contracts, images, etc.
Groups	Associated groups or categories.
User Flds	User Fields can have a different label for each Contact Type.
Add'l Info	Allows user to add more info depending on contact type. (The labels change as contact type changes.)
Associate	An unlimited number of associates, contacts and addresses related to the main Contact record. Each has their own contact record and related activities.
Relations	Allows users to identify the relationships between the selected Contact and other Results contacts with the option to immediately view or edit any related Contact record.
Notes	Notes about the account. (Searches can be performed against contents of this field.)
Finances	YTD and history-to-date sales totals, payment terms and balance due.
Sls Ord.	Allows users to see any associated Sales Orders for the current Contact.
Invoices	Associated invoices.
Inv. Detail	Purchased products and/or services.
Payments	Payments against any invoice generated under this contact.
Products	Displays specialty / custom Products for the Contact.
Expenses	Expenses associated with this contact.

How to Add a New Contact

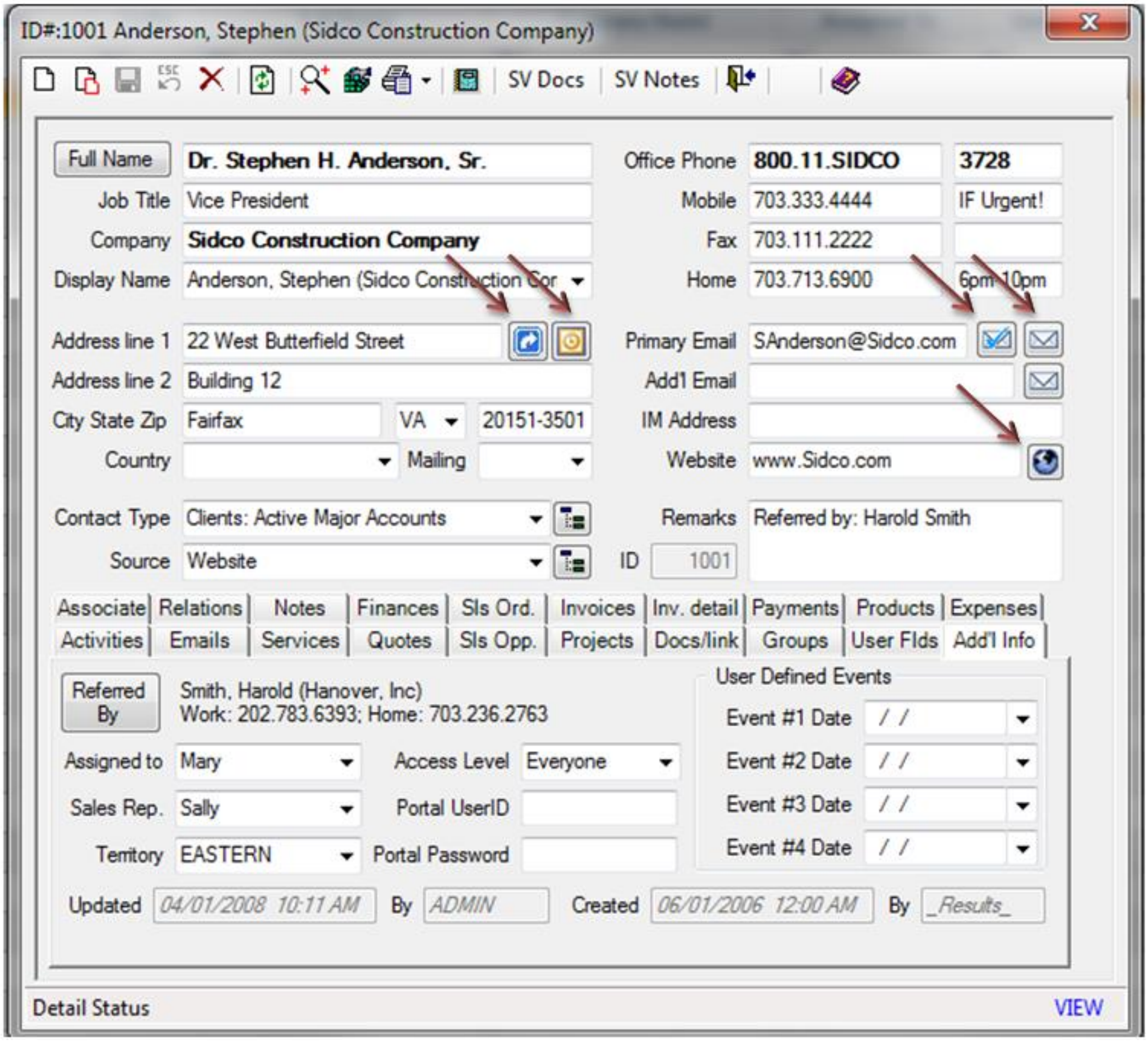
1. On the **Contacts** tab, in the **Contacts** group, click **Add**.
2. Type in a **Full Name** for your Contact.
3. Select a **Contact Type**.
4. Enter the information that you would like included for the Contact.
5. Click the save icon to save the record. **Note:** When a new record is saved, Results will run automatic duplicate record checking and display a message identifying potential duplicates within the system.

Field Definitions:

Contact ID: Results automatically displays a number that is unique to each Contact within the system.
Contact Type: Allows you to easily classify your contacts i.e. vendors, employees, prospects, etc.
Source: Allows you to track your marketing efforts. How / where did you meet this contact?

Contact Screen Icons

Figure 14: Contact Screen Icons



Icon	Description
	Opens GoogleMap.com to the address listed on the record.
	Exports the Contact record into an Outlook address book entry.
	Sends a Keep-In-Touch email to Verify & Update Contact Information
	Opens an email preaddressed to the contact.
	Opens the contact's website.

How to Open an Existing Contact Record

1. On the **Contacts** tab, in the **Contacts** group, click **Manage**. The **Contacts Data Management Center** will appear.

2. To filter your search, do one of the following:

   - Click on the **Standard Search** tab, enter search criteria and click **Apply**.
   - Use the column filtering feature.

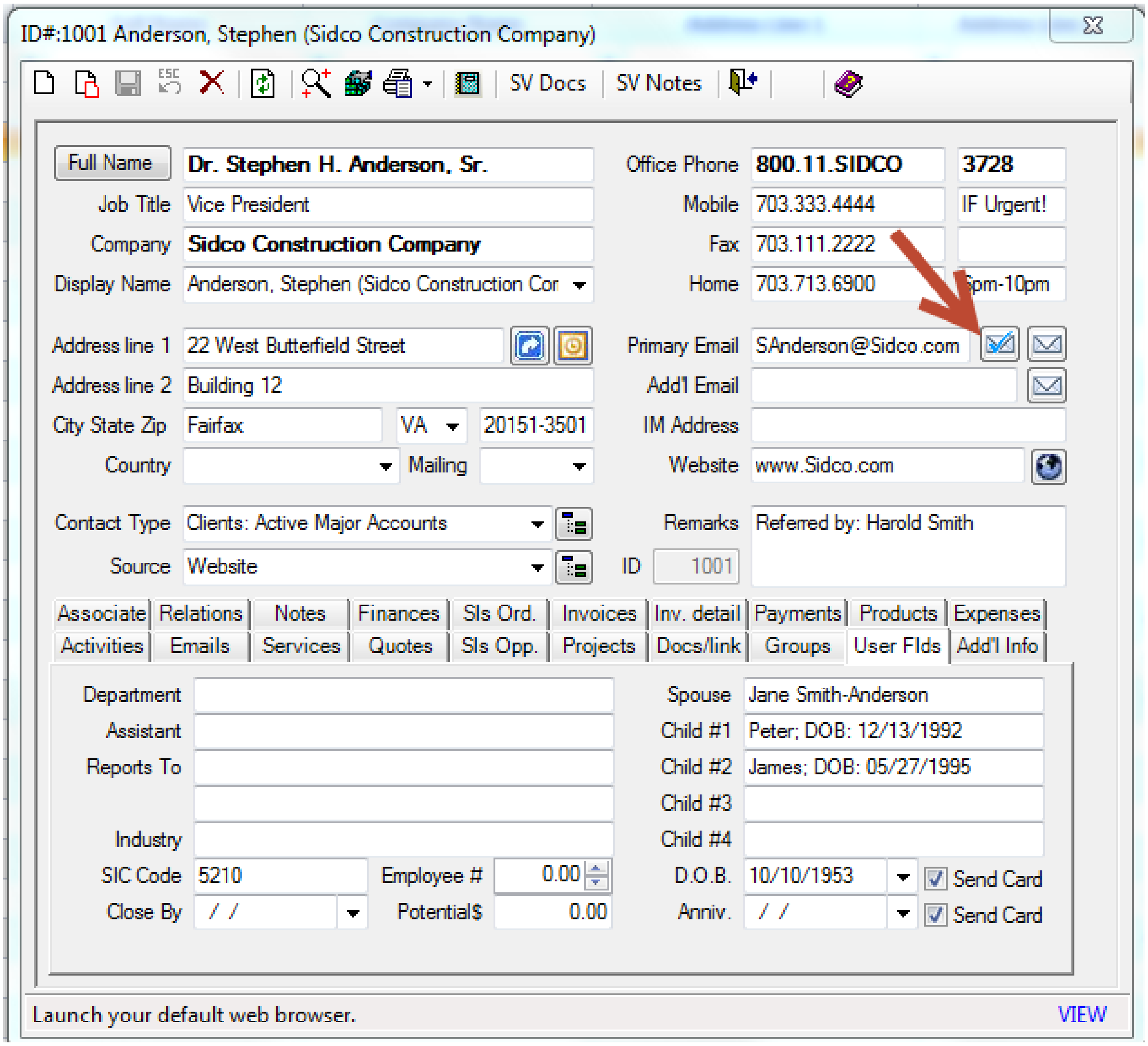
3. A list of contacts meeting your search criteria will appear. Double-click on the Contact record you would like to open.

Using Keep-in-Touch Emails

The Keep-in-Touch email feature allows users to easily and efficiently assure that contact information stays up to date within Results. The Keep-in-Touch email sends a copy of Results contact information to individual contacts and request that they update the information within the email. The contact should update their information directly within the received email and send it back to the Results user. When the received email is imported back into Results, the Results contact record automatically updates based on the information that was sent in.

1. From the **Contact Record** (Refer to *How to Open an Existing Contact Record*), click the **Keep-in-Touch** email icon.

Figure 15: Keep-in-Touch Icon



3. An email containing the contact information on this screen will be sent to the **Primary Email** address. The email will ask the contact to update outdated information directly within the email.

4. When the email is returned and imported back into Results via Results QuickAdd, the imported email will automatically update the appropriate Contact Record with the information displayed in the returned email.

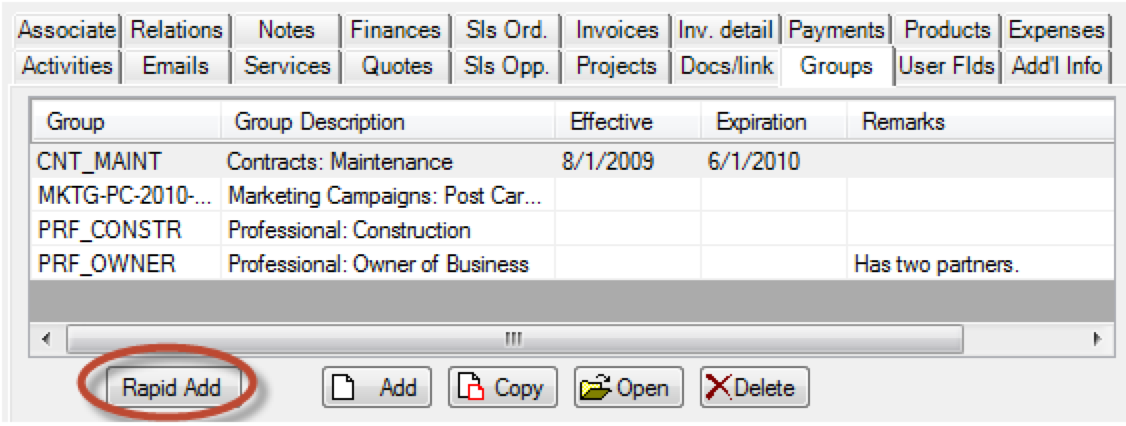
Contacts: Groups

How to Add a Contact to a Group

1. From the **Contact Record** (Refer to *How to Open an Existing Contact Record*), navigate to the **Groups** tab.

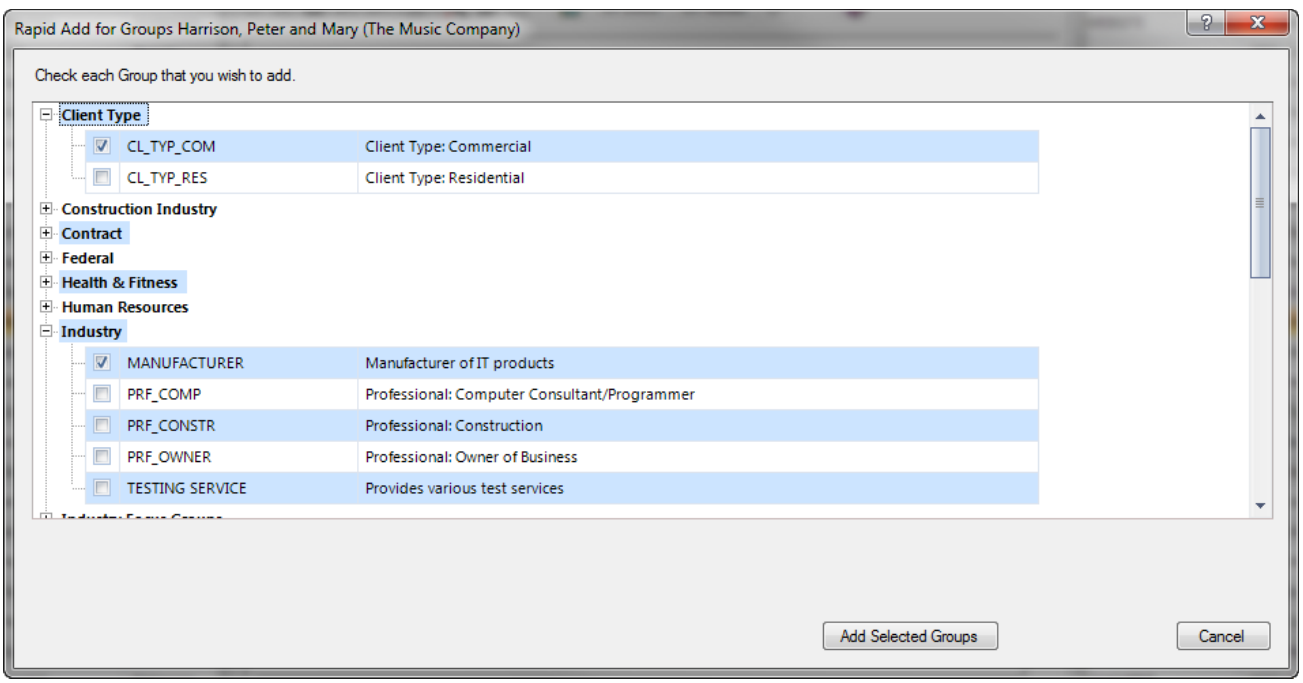
2. Click the **Rapid Add** button.

Figure 16: Groups Tab (Contact Screen)



3. Click the + icon next to the Group you wish to expand. Place a checkmark next to the appropriate groups for this contact.

Figure 17: Rapid Add for Groups Screen



4. Click the **Add Selected Groups** button.

5. A message indicating how many Groups were added will be displayed.

6. Click **OK**.

How to Perform Searches for Contacts within Certain Groups

From the Standard Search Tab:

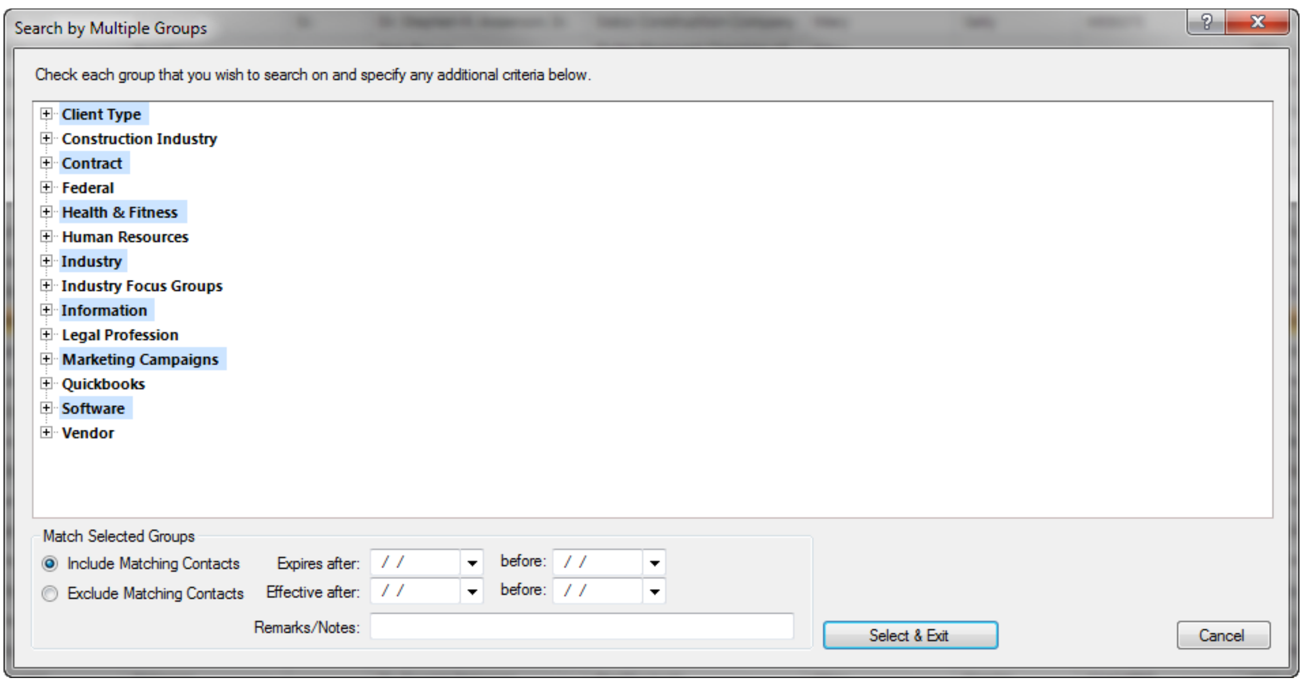
1. From the Contacts DMC, click on the **Standard Search** tab.

2. Click on the ellipse () button next to the **Groups** field.

3. Click the + icon next to the Group you wish to expand. Place a checkmark next to the groups that you would like to include in your search.

4. At the bottom of the screen, select whether you would like your search to identify contacts that include or exclude the Groups selected. You can also specify specific date ranges for your search.

Figure 18: Search by Multiple Groups Screen



5. Click the **Select & Exit** button.

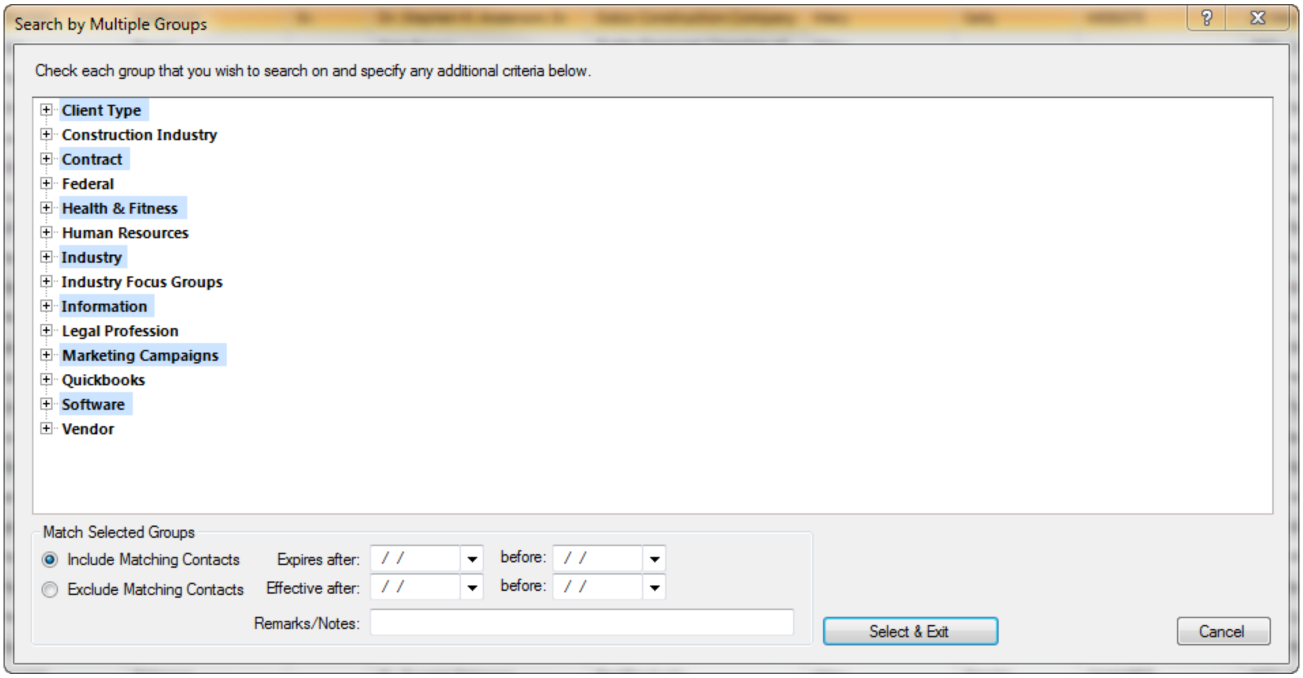
6. The DMC will return all records that fit your search criteria.

From the Standard Search Tab:

1. From the Contacts DMC, click on the **Group Search (** 

) button in the DMC toolbar. The **Search by Multiple Groups** screen displays.

Figure 19: Search by Multiple Groups Screen



2. Click the + icon next to the Group you wish to expand. Place a checkmark next to the groups that you would like to include in your search.

3. At the bottom of the screen, select whether you would like your search to identify contacts that include or exclude the Groups selected.

4. Click the **Search for Selected** button.

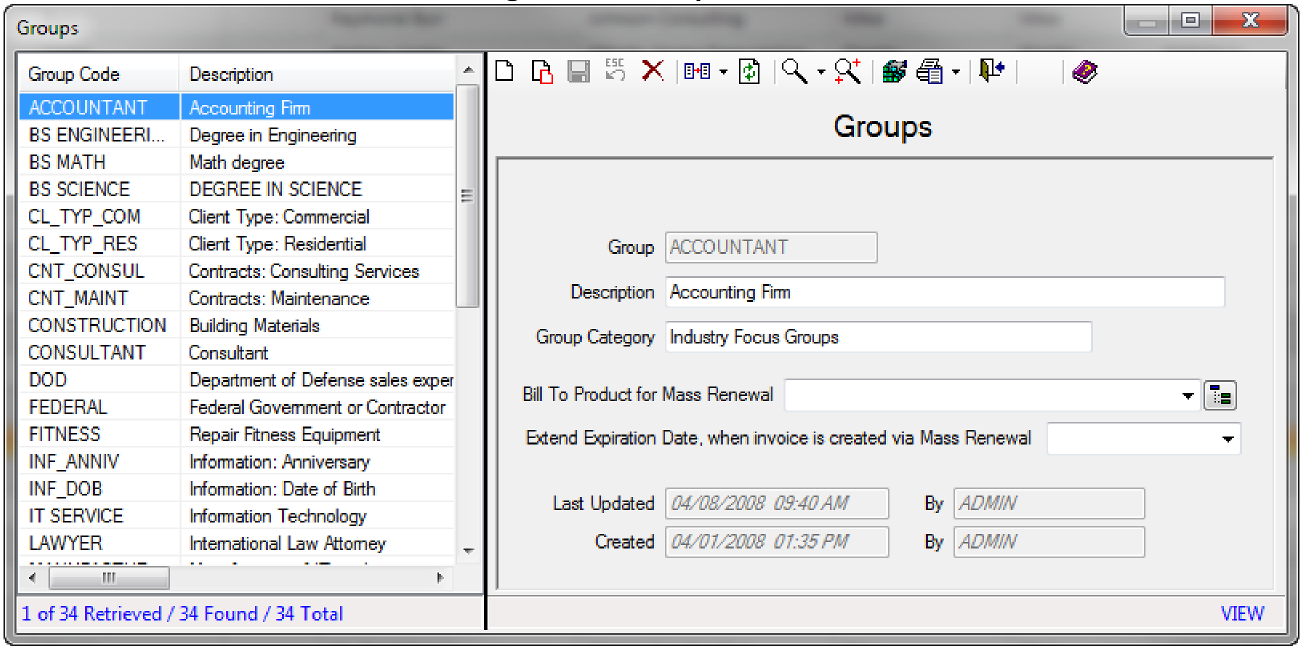
5. The DMC will return all records that fit your search criteria.

How to Add Groups

1. On the **Set Up** tab, in the **Maintain Lookup Values** group, click **Contacts** and then select **Groups**.

2. Click the **Add** icon to add a new entry.

Figure 20: Groups Screen



3. Fill out the **Group, Description**, and **Group Category** fields. If this is an entry for Mass Renewal, select a **Bill to Product.**

4. Click the **Save** icon to save the record.

Contacts: Associates

How to Add an Associate Contact

1. From the **Contact Record** (Refer to *How to Open an Existing Contact Record*), navigate to the **Associates** tab.

2. Click the **Add** button.

3. Type in a **Full Name** and **Contact Type** for your Contact.

4. Enter the information that you would like included for the Contact.

5. Click the  icon to save the record.

How to Convert a Contact Record into an Associate Record

You can convert a Contact Record into an Associate Record for another Contact using the Combine Records feature. Please refer to the *Duplicate Records and Combining Contacts* chapter for more information.

Sending Emails in Results

Email Options and Setup

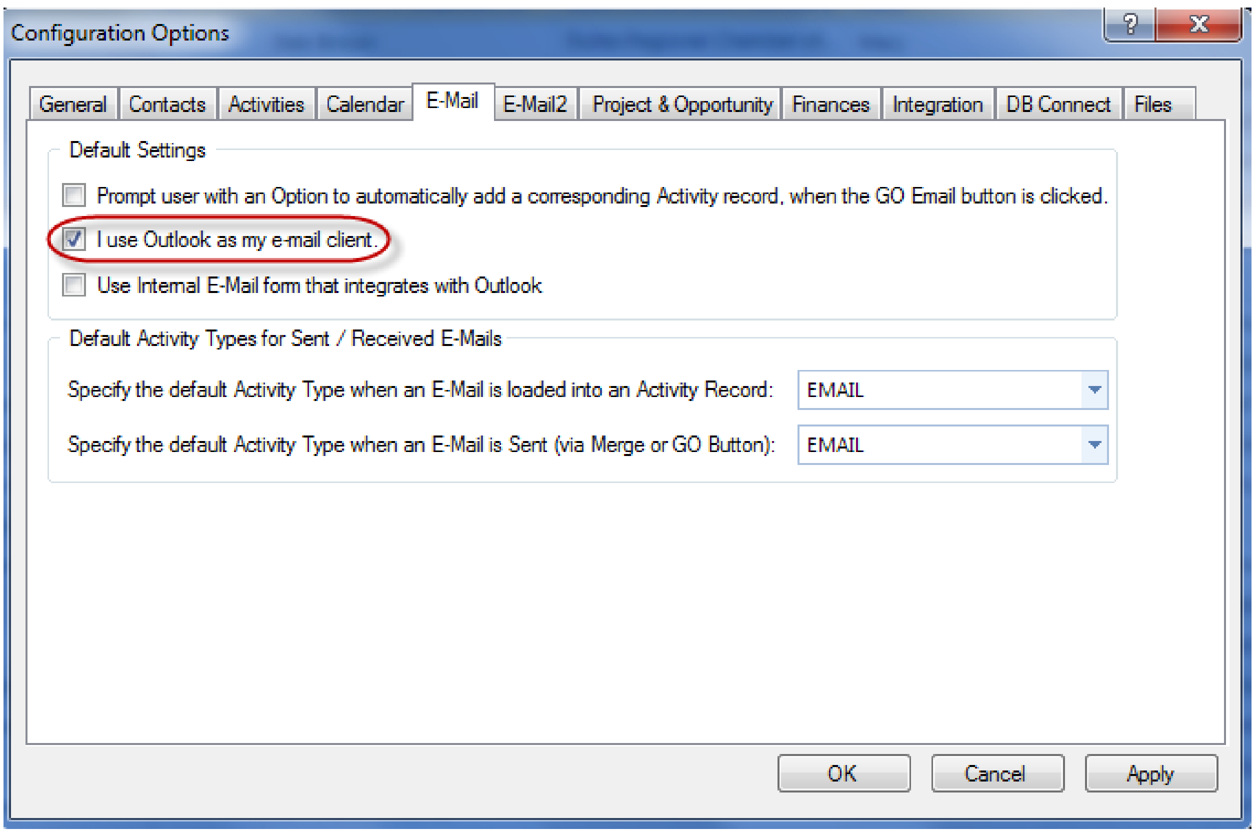
Emails can be sent to any Results contact from within Results. Emails can be composed using Outlook or using an email screen that is internal to Results.

To Configure Results to Send Emails Using Outlook

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The **Configuration Options** screen will appear.

2. On the E-mail tab, check the **"I use Outlook as my e-mail client"** option.

Figure 21: Configuration Options Screen – Set for Outlook



3. Click **Apply**.

Note: With this option checked, the emails you compose from within Results will be sent via Outlook and will contain your formatting preferecnes and signature blocks that have been configured in Outlook.

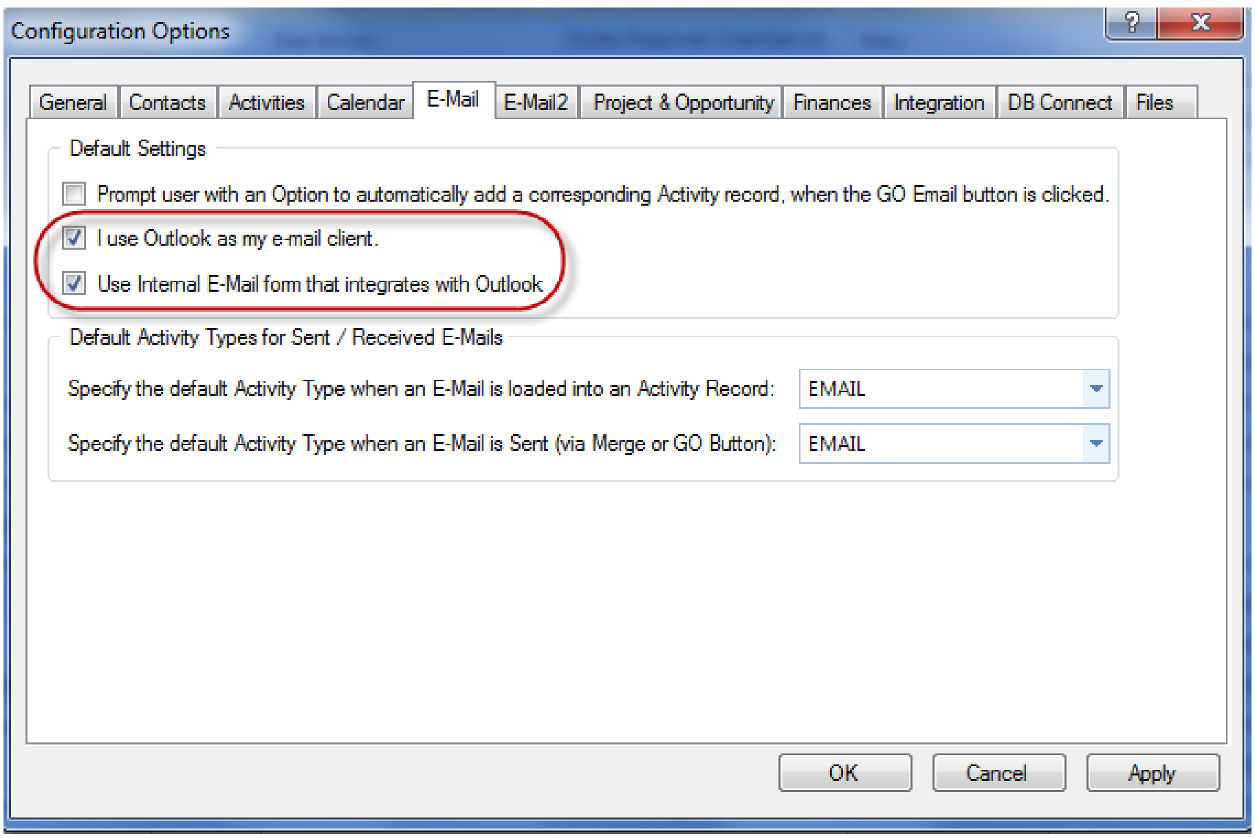
Note: When you you select to use default text for the body of the email (set up in the Configuration Options screen), the Outlook signature block does not appear.

To Configure Results to Send Emails Using the Internal Email Form

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The **Configuration Options** screen will appear.

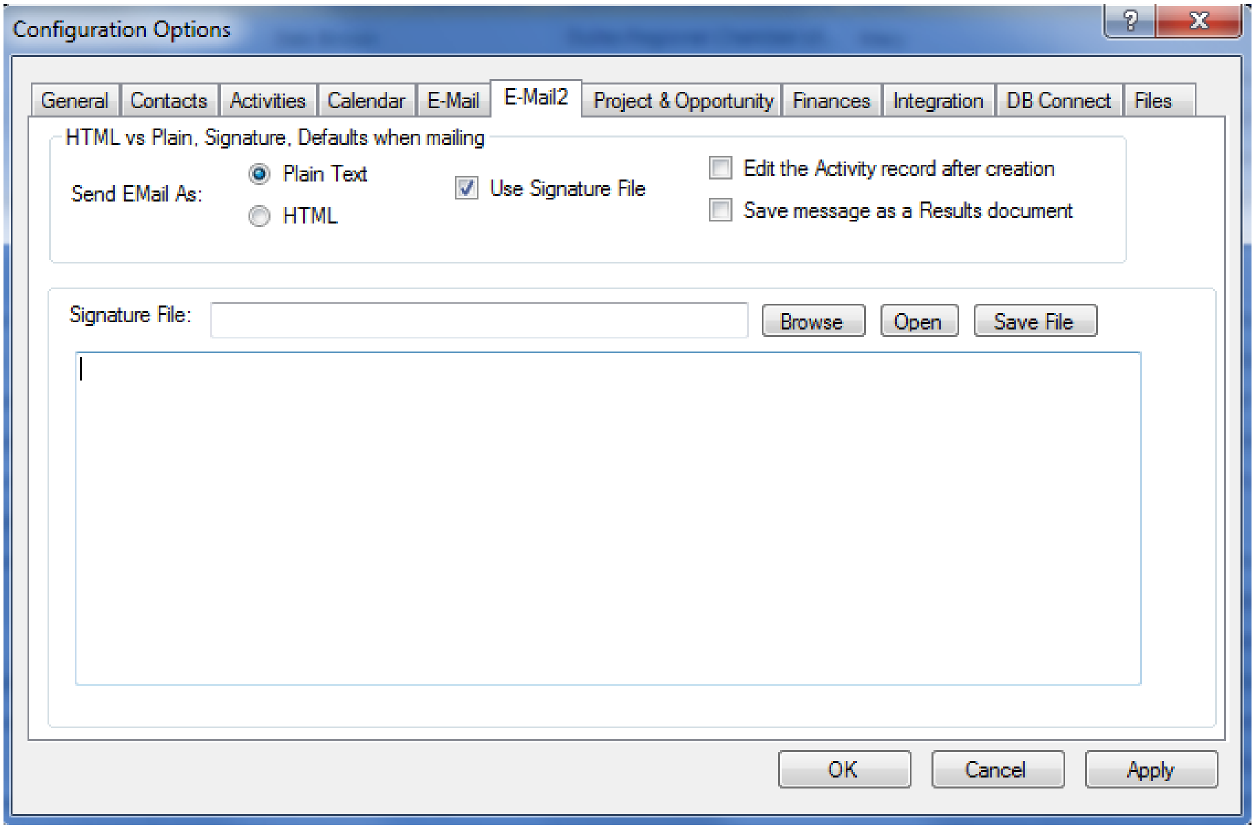
2. On the E-mail tab, check the **"I use Outlook as my e-mail client"** option and the **"Use Internal E-mail form that Integrates with Outlook"** option.

Figure 22: Configuration Options Screen – Set for Results Email Forms



3. On the E-Mail 2 tab, set up your email preferences including HTML vs Plain Text, Signature blocks, etc.

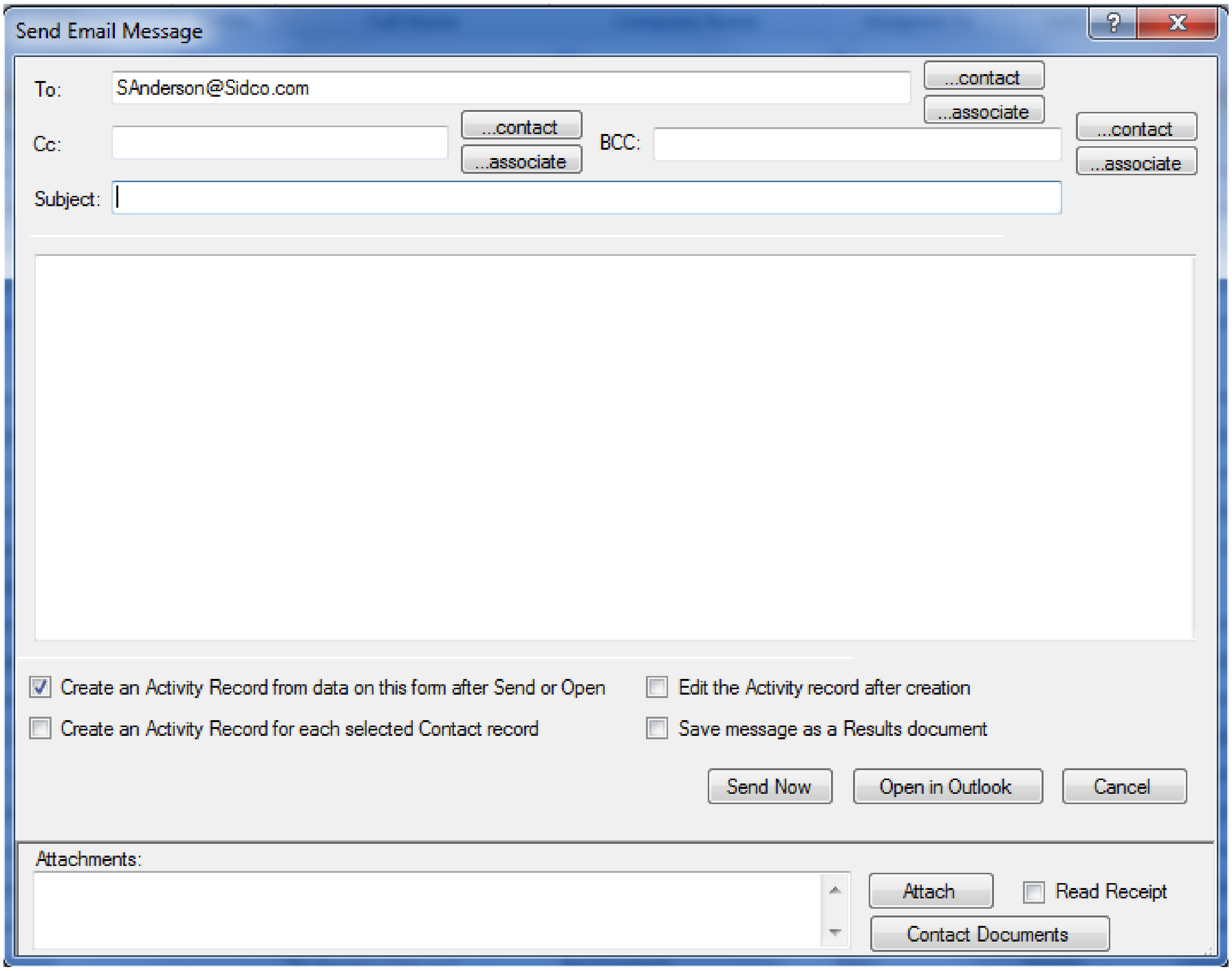
Figure 23: Configuration Options Screen – E-Mail2 Tab



4. Click **Apply** and then click **OK**

Note: When you choose to send emails using the internal email form, email will be sent via Outlook but the email editor will look like screen below.

Figure 24: Internal Results Email Form



To send a Results email, compose your email and choose the appropriate options at the bottom of the message that allow you to create or edit Activity Records, add attachments, or save the email as a document.

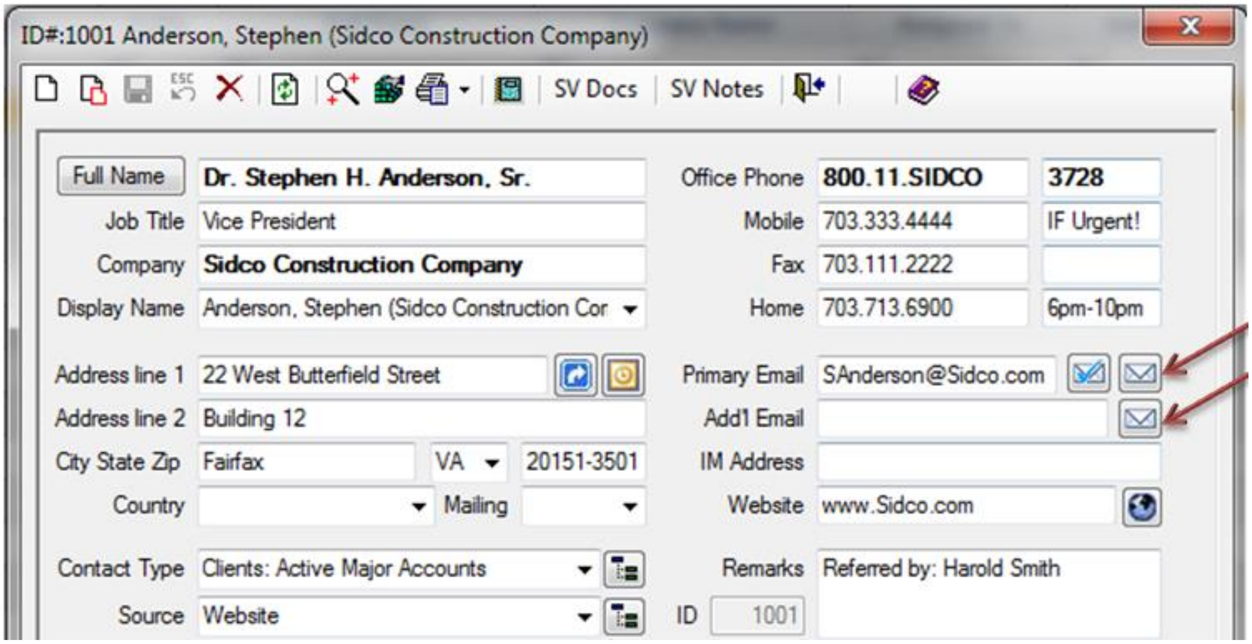
To send immediately, click **Send Now** or, for further editing, click **Open in Outlook**.

To Email from a Contact Record

1. Open the appropriate contact record.

2. Click the email icon next to either the **Primary Email** or **Add'l Email** fields.

Figure 25: Contact Screen Showing Email Icons



3. Based on your Configuration Options, a Results or Outlook email will appear. (Refer to the *Email Options and Setup* for additional details.)

4. Compose your email and send.

To Email from a DMC

1. Open a Data Management Center and perform any necessary searches to narrow the records displayed.

2. Place a checkmark next to each contact you would like to include in the email.

3. Click the **Email** button on the DMC toolbar. Based on your Configuration Options, a Results or Outlook email will appear ad be addressed to the identified contacts. (Refer to the *Email Options and Setup* for additional details.)

4. Compose your email and send.

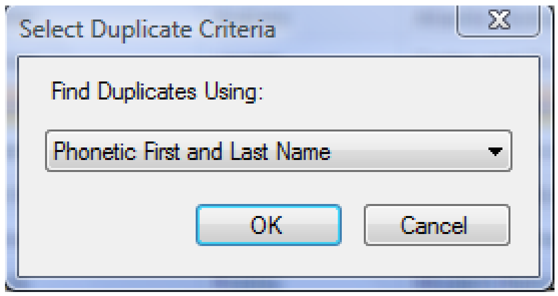
Duplicate Records and Combining Contacts

How to Search and Combine Duplicates Records

1. In the Contacts DMC, click on the **Find Duplicates** button on the DMC toolbar.

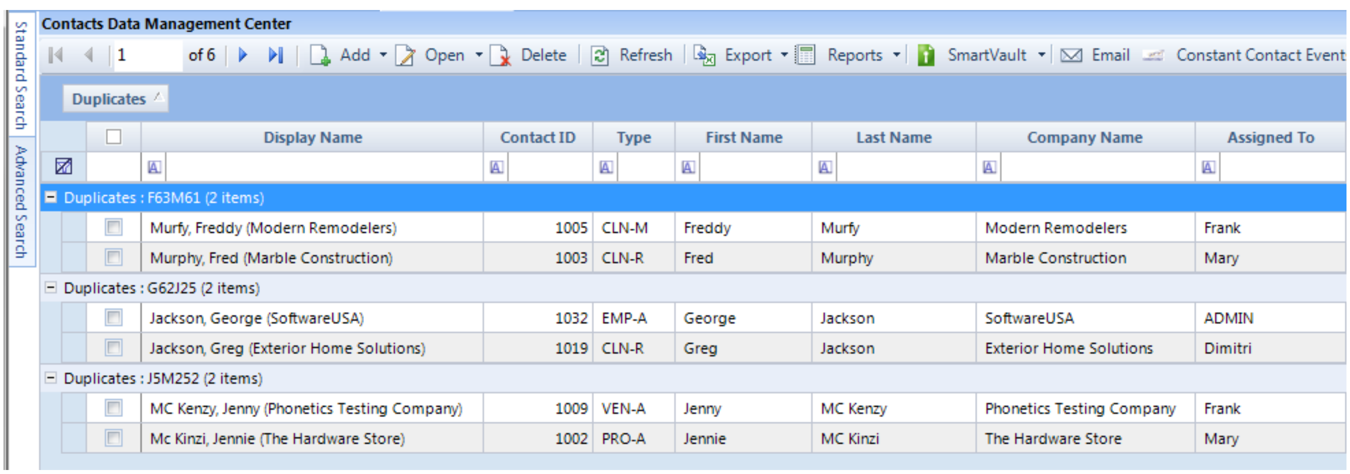
2. Select one of the duplicate checking options and click **OK**.

Figure 26: Select Duplicate Criteria



3. The DMC screen will show potential duplicates grouped together.

Figure 27: Contacts DMC with Potential Duplicates Grouped Together

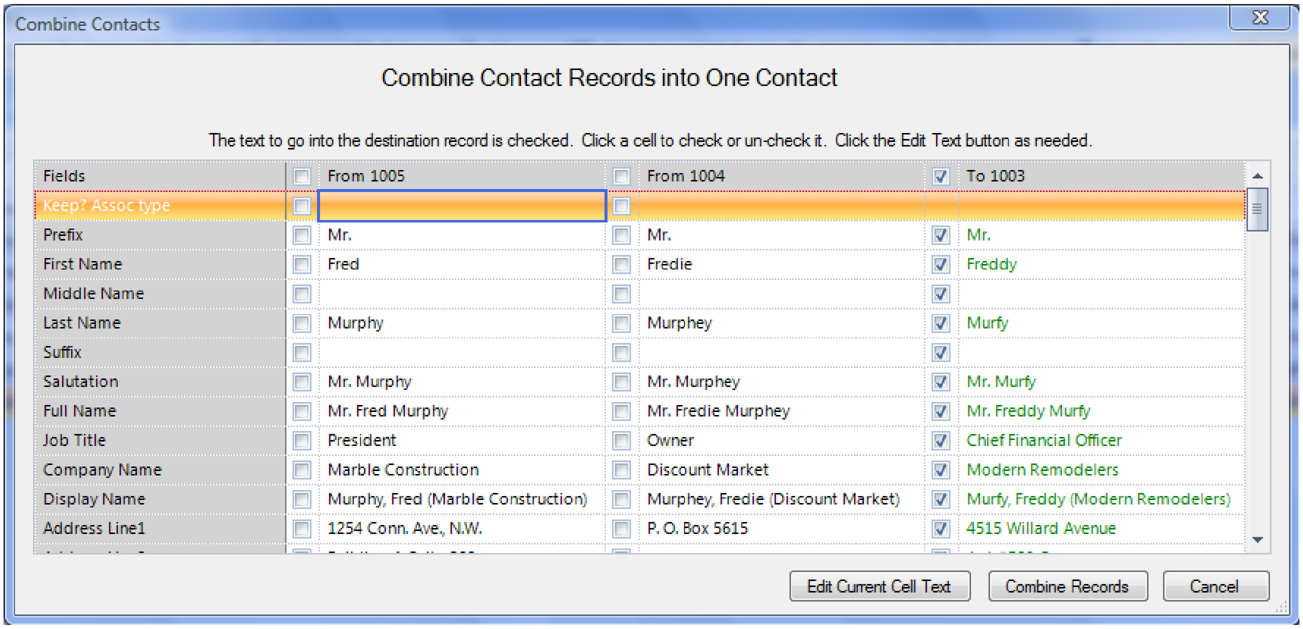


4. Select the records you would like to combine by placing a check in the appropriate row. **Note:** You can select up to six records at once.

5. Click the **Combine Contacts** button on the DMC toolbar. The Combine Contacts screen appears.

6. In the header row, identify the primary record that you'd like to keep by placing a check next to the Contact ID. The information for this record will turn green, indicating that this is the data that will be preserved.

Figure 28: Combine Contacts Screen



7. Review the information displaying for the other contacts. If you would like to preserve a particular field from a contact other than the identified primary, place a check next to that field. The information there will turn green, indicating that is the information that will be preserved. Note: You can select more than one **Remarks**, **Notes** and **User** fields. The content from each of the Contact records will be combined and preserved in the final/surviving Contact record.

8. Edit any incorrect data directly from this screen by clicking in the cell of the surviving data. Note: The Notes field cannot be edited in this way.

9. Once all the selections are made, click **Combine Records** to combine all the listed contacts into a single record. The surviving record will merge information from all of the contacts and will automatically update the Finances Tab with the Year-to-Date, History-to-date, and Due. In addition, information from the following tables will be combined into the primary contact record: Activities, Emails, Service/Work Orders, Contact Associates, Groups & Categories, Documents & Links, Quotes, Sales Opportunities, Sales Orders, Purchase Orders, Projects, Invoices, Payments, Products, and Expenses.

Combining Contacts as Associate Records

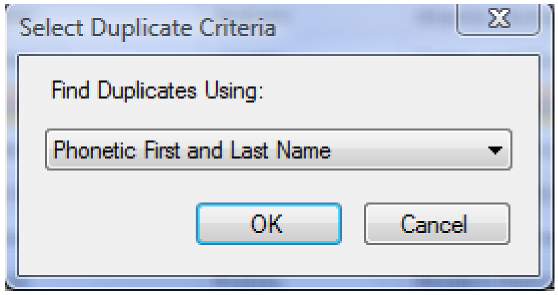
When combining Contacts, you can select a primary contact and save the other contacts as Associate records of the primary contact**.** For example, if you have three contact records with the same Company Name but each has a unique individual name, phone numbers and email address, you can move two of the contacts to Associate records of the main/surviving record.

To Combine Contacts as Associate Records:

1. In the Contacts DMC, click on the **Find Duplicates** button on the DMC toolbar.

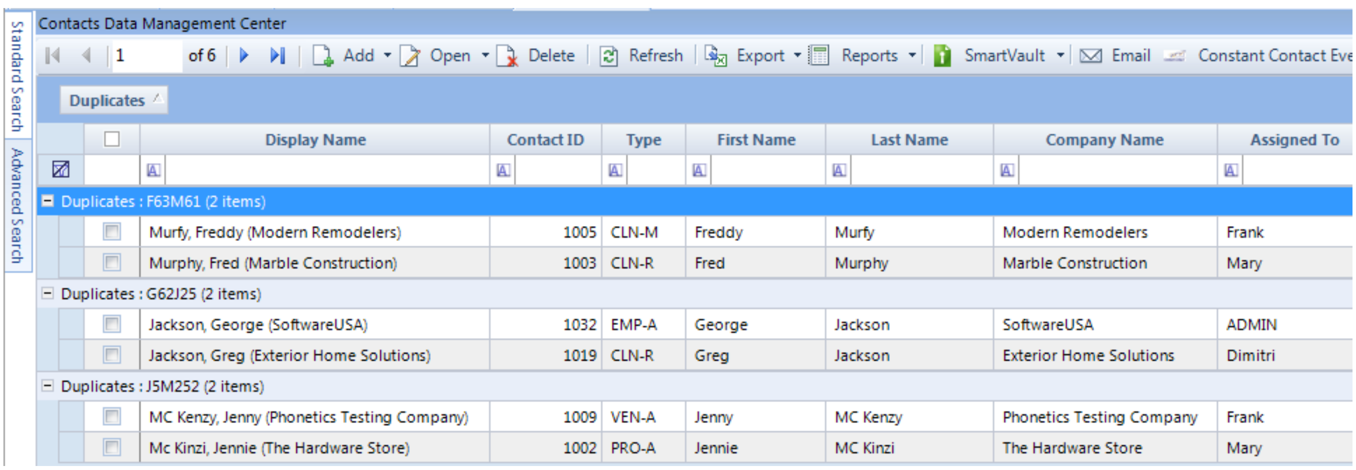
2. Select one of the duplicate checking options and click **OK**.

Figure 29: Select Duplicate Criteria



3. The DMC screen will show potential duplicates grouped together.

Figure 30: Contacts DMC with Potential Duplicates Grouped Together



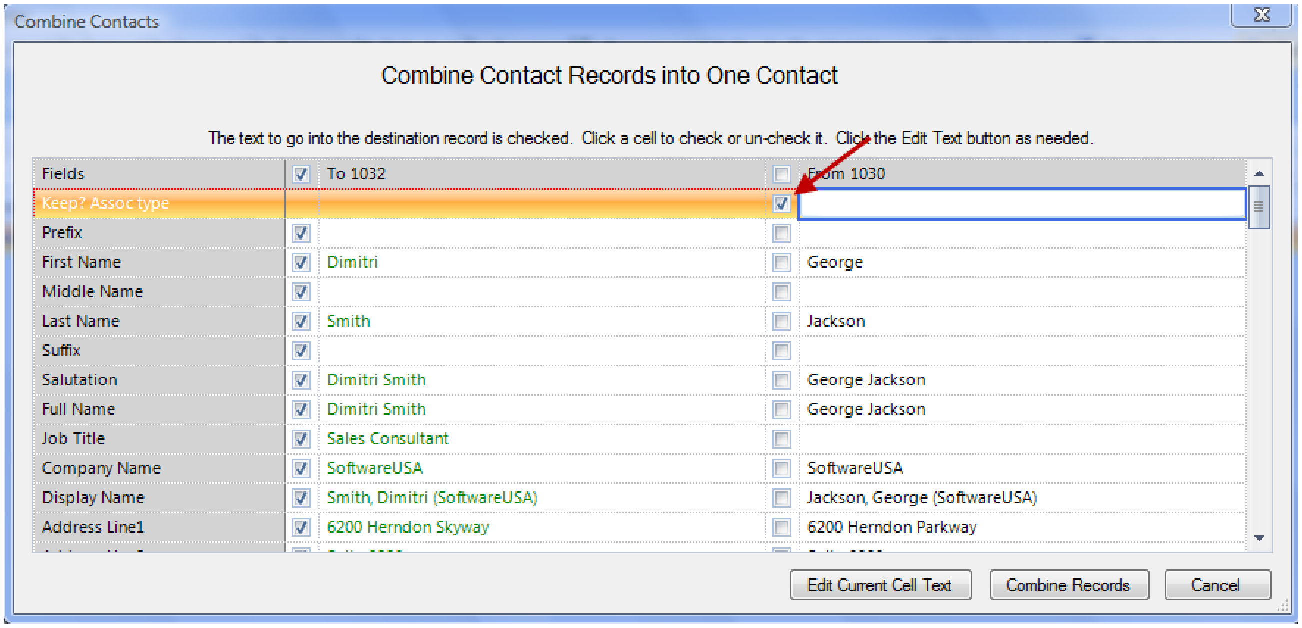
4. Select the records you would like to combine by placing a check in the appropriate row. **Note:** You can select up to six records at once.

5. Click the **Combine Contacts** button at the top of the Contacts DMC. The Combine Contacts screen appears.

6. In the header row, identify the primary record that you'd like to keep by placing a check next to the Contact ID. The information for this record will turn green, indicating that this is the data that will be preserved.

7. In the second row (**Keep? Assoc type**), place a checkbox next to the Contacts you would like to keep as Associate Records.

Figure 31: Combine Contacts – Combine Records as Associates



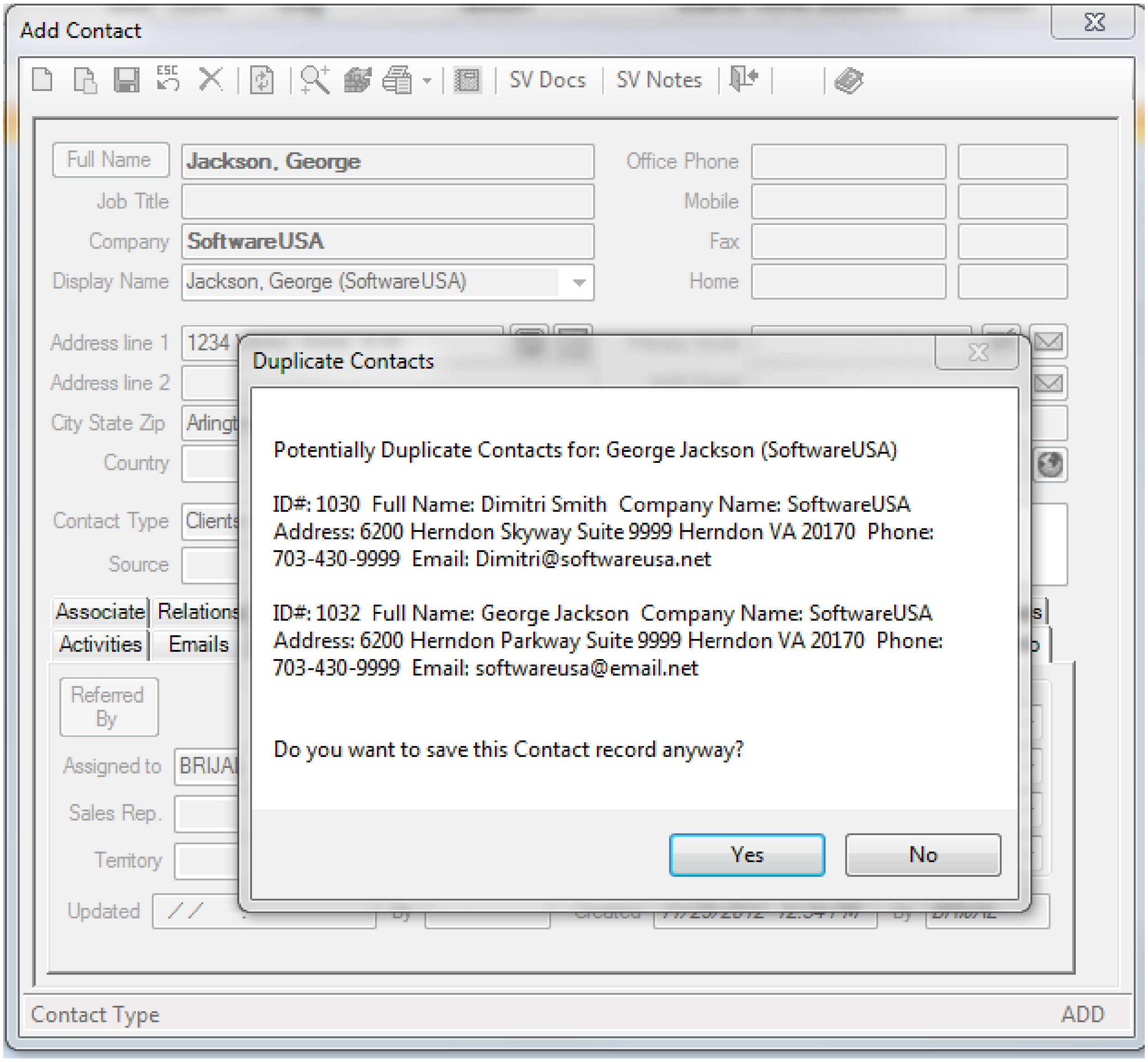
8. Next to the checkbox in the second row, type in the Associate Type.

9. Click the **Combine Records** button.

How to Check for Potential Duplicates when Adding a Contact Record

When a new contact is added, Results automatically checks for Potential Duplicates within the database by comparing the First and Last Names and/or the Company Name. If a potential duplicate is identified when the record is saved, you will receive the following Duplicate Contacts message.

Figure 32: Example of Duplicate Contacts Message (for George Jackson)



Calendar & Activities

The Calendar displays meetings, activities and tasks that have been scheduled in Results. Calendars can be viewed in daily, weekly, monthly, timeline views or by different departments of users.

To View the Calendar

1. Click the **Calendar & Activities** tab. From the **Calendar Views** group, choose to view the calendar in one of five ways:

Figure 33: Calendar - Daily View

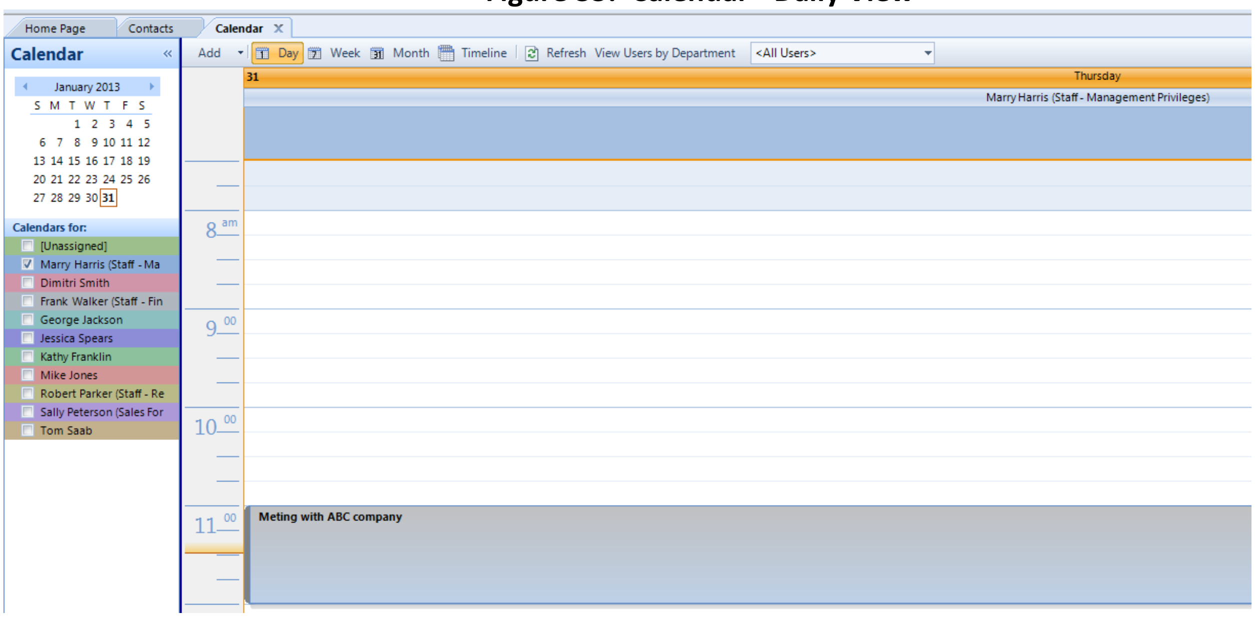


Figure 34: Calendar - Weekly View

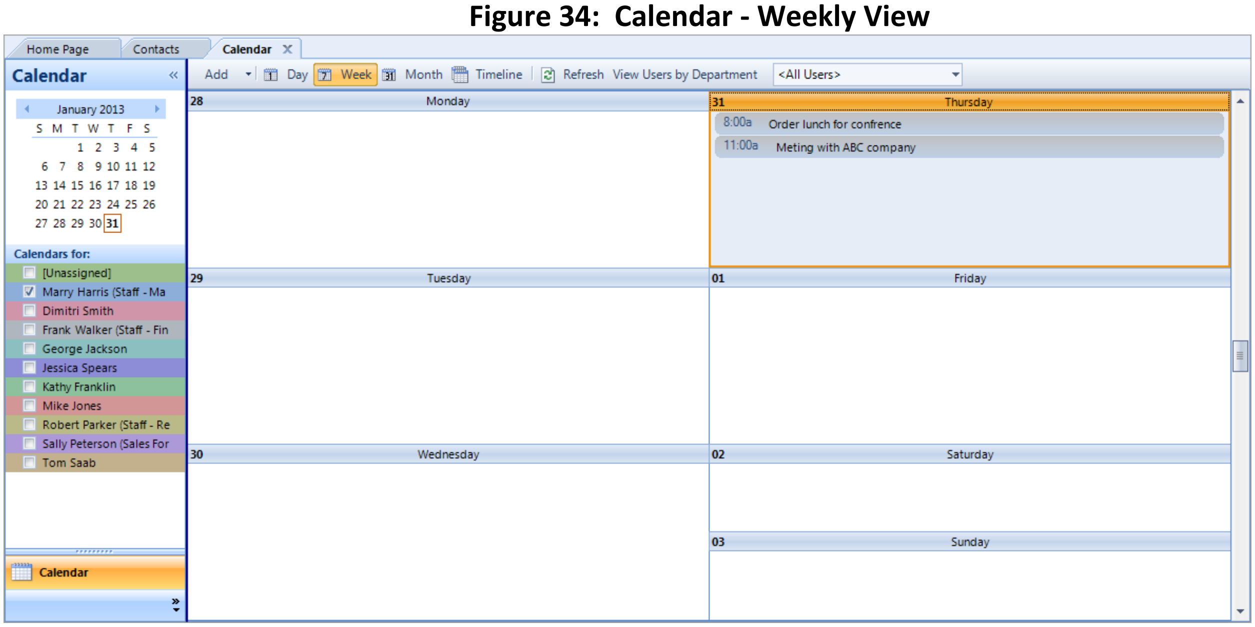


Figure 35: Calendar - Monthly View

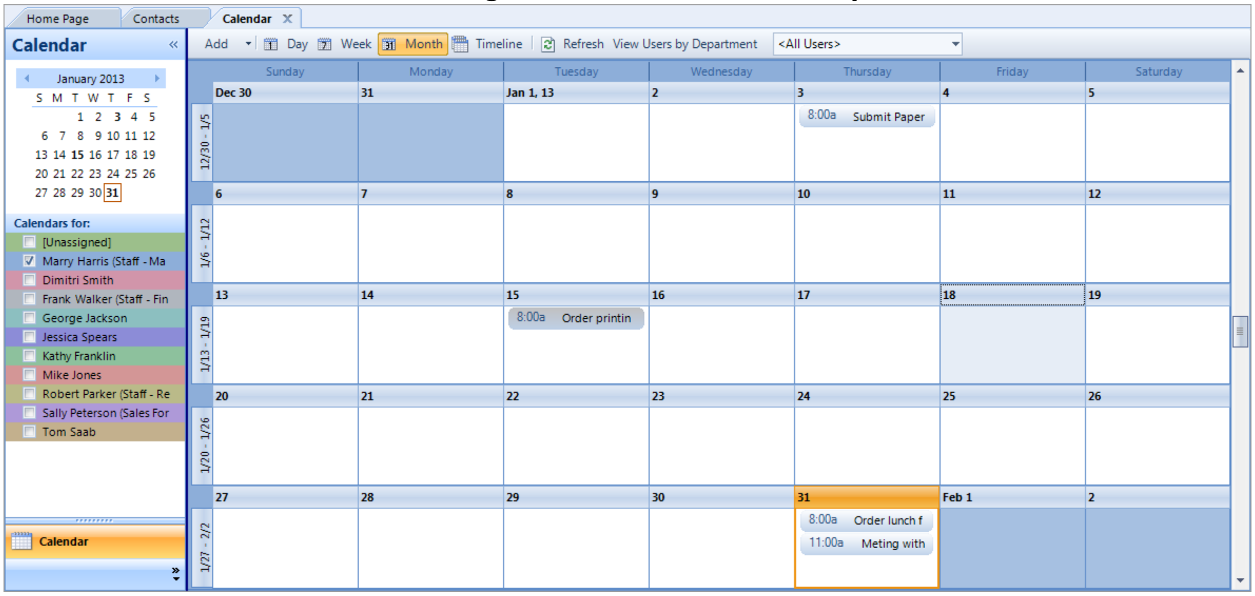
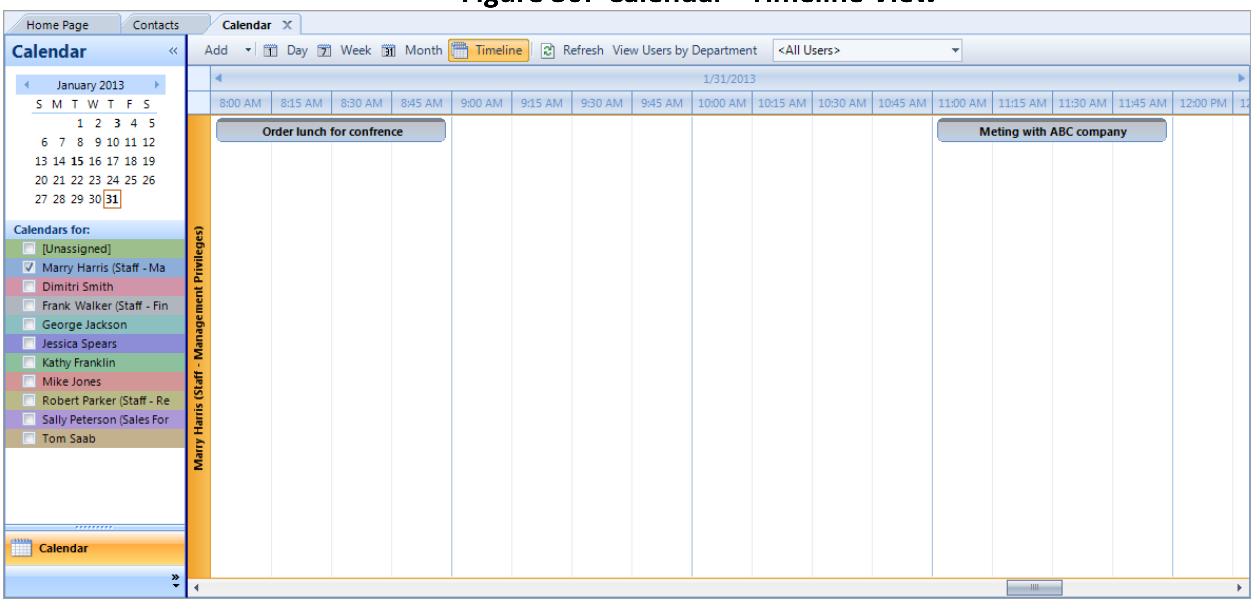


Figure 36: Calendar - Timeline View



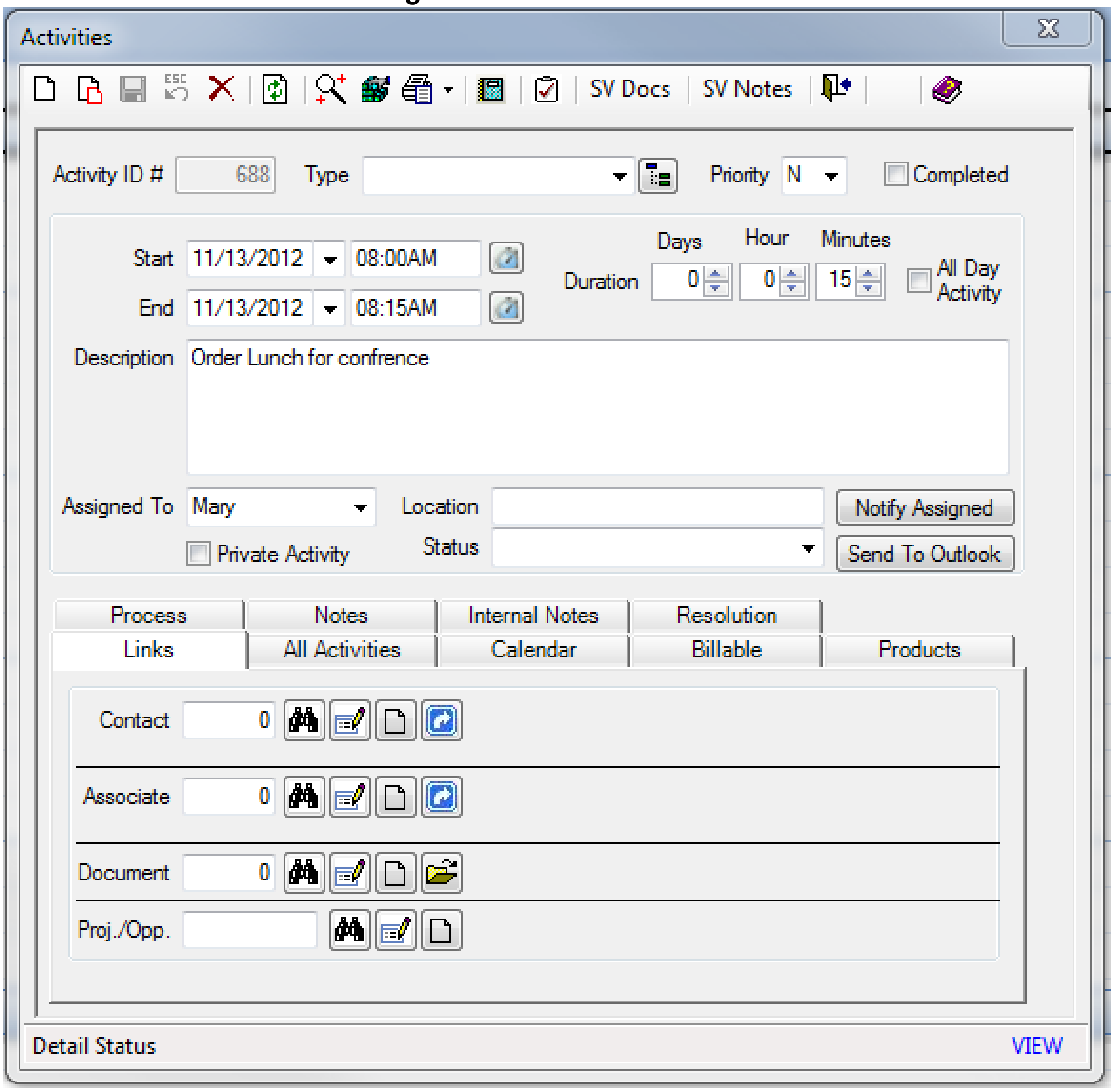
To Schedule an Activity

Option 1: From the Main Menu

1. On the **Calendar & Activities** tab, in the **Activities** group, click **Add**.

2. The **Activities** screen appears.

Figure 37: Activities Screen



3. Choose the **Type** of activity you would like to schedule.

4. If the Activity is considered a priority, change the **Priority** to "Yes".

5. Fill in the appropriate **Start** and **End** date and times.

6. Fill in a **Description** for the Activity. (This is what will appear on your Calendar.)

7. The **Assigned To** field defaults to the User that is currently logged into the system. Change this field if necessary.

8. (Optional) Enter a **Location** and select a **Status**.

9. To link a Contact to this Activity, navigate to the **Links** tab. Click the binoculars icon next to the **Contacts** field. Choose the Contact that is associated with this record by double clicking on the Contact's name. You will be returned to the Activities Screen.

10. To identify if you would like the activity to appear in your calendar or to schedule a reminder alarm or recurring activity, navigate to the **Calendar** tab and choose the appropriate options.

11. Click the icon to save the record.

Option 2: From the Calendar

1. On the **Calendar & Activities** tab, select one of the **Calendar Views**.

2. If you selected Daily or Timeline views, single-click in the time that you would like to schedule your activity.; if you selected weekly or monthly view, single-click on the day that you would like to schedule your activity.

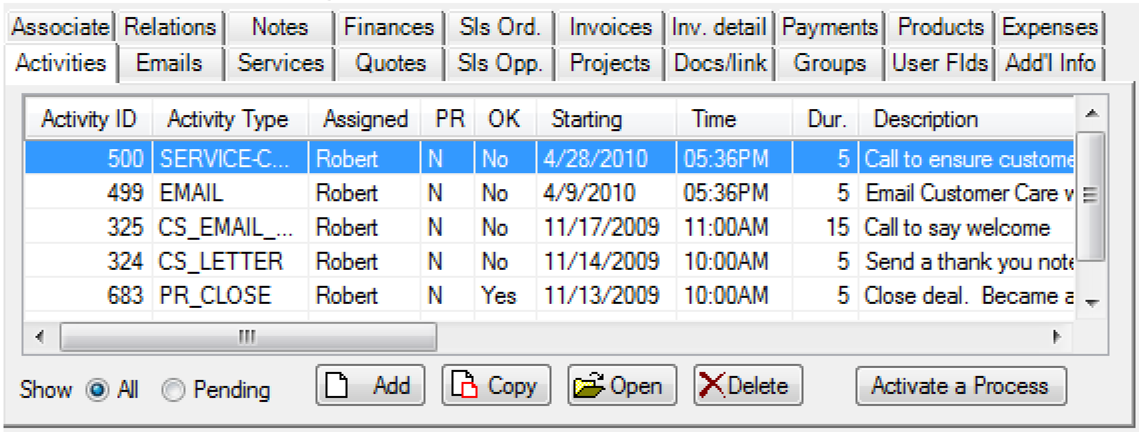
3. Type a description of the activity. **Note:** If you would like to access details of the activity or view the **Activity** screen, double click on your new calendar entry.

Option 3: From a Contact Record

1. From the Contact record, navigate to the **Activities** tab. (Refer to *How to Open an Existing Contact Record*.)

2. Select the **New** button under the **Activities** tab.

Figure 38: Contact Screen - Activities Tab



3. The **Activities** screen will appear. Please refer to *Option 1* in this section for instructions on how to complete this screen.

To Change or Edit a Scheduled Activity

Option 1: From the Activity Data Management Center (DMC)

1. On the **Calendar & Activities** tab, in the **Activities** group, click **Manage**. The **Activities Data Management Center** will appear.

2. To filter your search, do one of the following:

   - Click on the **Standard Search** tab, enter search criteria and click **Apply**.
   - Use the column filtering feature.

3. A list of contacts meeting your search criteria will appear. Double-click on the Activity record you would like to open.

4. The **Activity** screen will appear. Edit the information as necessary.

5. Click the **Save** icon to save the record.

Option 2: From the Calendar

1. On the **Calendar & Activities** tab, select a view within the **Calendar Views** group. The **Calendar** will appear.

2. Single-click on the activity you would like to edit.

3. Type a new description for the activity or adjust the height of the displayed activity to alter the time. **Note**: If you would like to edit details of the activity or view the **Activity** screen, double-click on the desired calendar entry.

Option 3: From a Contact Record

1. From the Contact Record (Refer to *How to Open an Existing Contact Record*), navigate to the **Activities** tab.

2. Highlight the Activity that you would like to edit.

3. Click the **Edit** button under the **Activities** tab.

4. The **Activities s**creen will appear. Edit the information as necessary.

5. Click the  icon to save the record.

To Schedule Recurring Activities

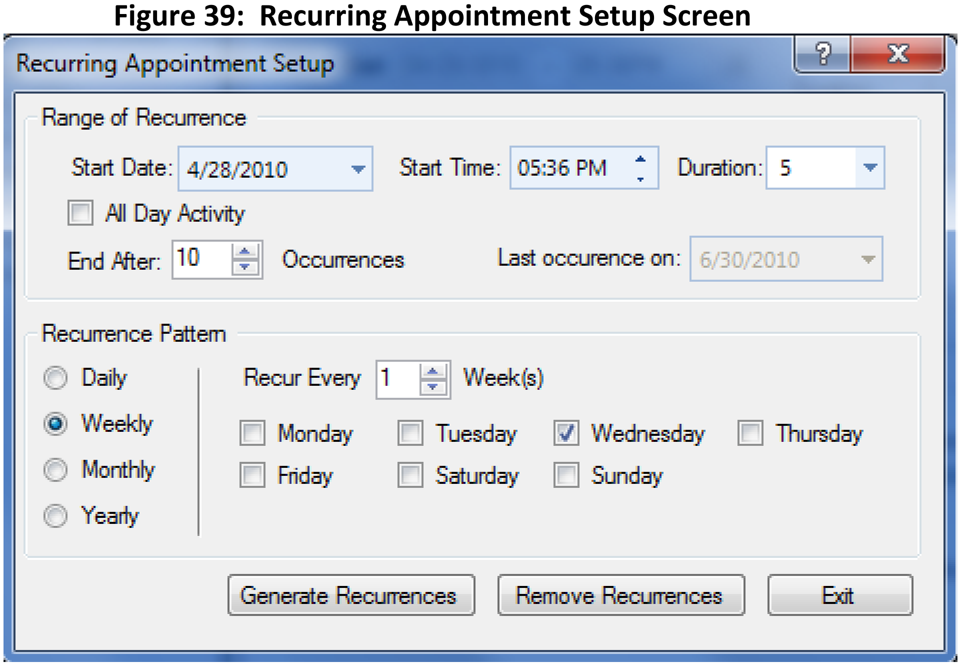
1. On the **Calendar & Activities** tab, in the **Activities** group, click **Add**.

2. Fill out the Activity screen as appropriate.

3. Navigate to the **Calendar** tab.

4. Click the **Add/Edit Recurrence** button. The Recurring Appointment Setup screen will appear.

Figure 39: Recurring Appointment Setup Screen



5. Enter appropriate data into both the **Range of Recurrence** and **Recurrence Pattern** sections of the screen.

6. Click the **Generate Recurrences** button.

7. You will be returned to the Activity Screen. Click **Save**.

The Workgroup Calendar

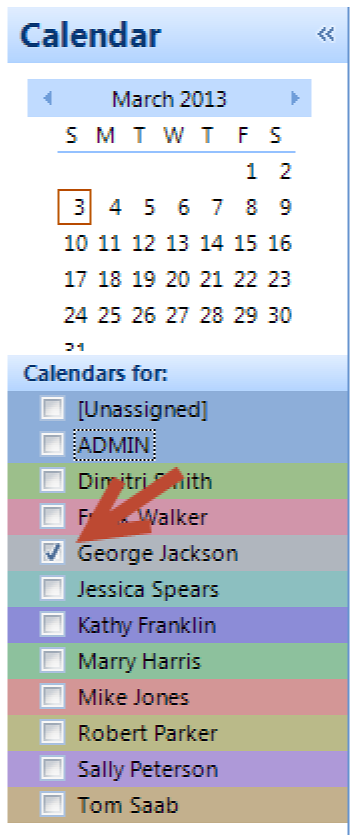
The calendar can be filtered to view each user's activities individually or all activities combined.

To View Another User's Calendar

1. On the **Calendar & Activities** tab, select one of the **Calendar Views**.

2. The left side of the calendar screen will display all system users. Select the **User** names of the Calendar you would like to view.

Figure 40: Calendar – Calendar User Selection



To Schedule an Activity for Another User

Option 1: From the Main Menu

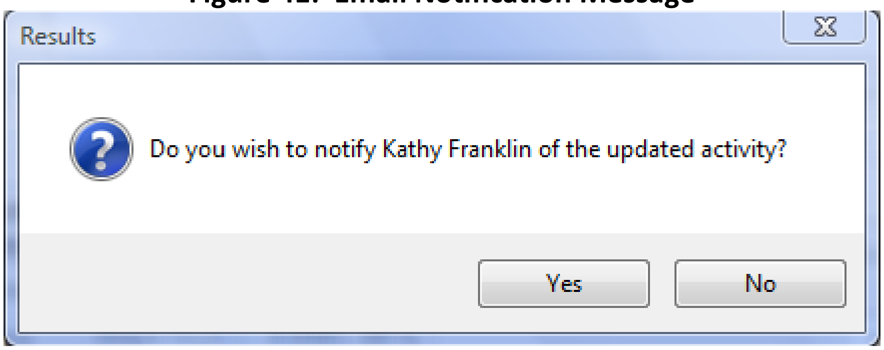
1. On the **Calendar & Activities** tab, in the **Activities** group, click **Add**. The **Add Activities** screen will appear. (Refer to *To Schedule an Activity* for information on how to complete this screen.)

2. To assign or schedule someone else for this activity, select the User's name in the **Assigned To** field.

3. Click the icon to save the record.

4. When someone other than the logged in User is assigned an activity, the following message will appear.

Figure 41: Email Notification Message



Note: Refer to the Configuration Options to set this option.

5. Click **Yes** to email the assigned user information about the new activity; click **No** to disregard this message.

Option 2: From the Calendar

1. On the **Calendar & Activities** tab, select one of the **Calendar Views**.

2. The left side of the calendar screen will display all system users. Select the **User** names of the person you would like to schedule for an activity.

3. When their calendar displays, type a Description of the activity in the appropriate time slot. **Note:** If you would like to access details of the activity or view the **Activity** screen, double-click on the calendar entry.

Outlook Integration

Outlook integrates with Results to perform these main functions:

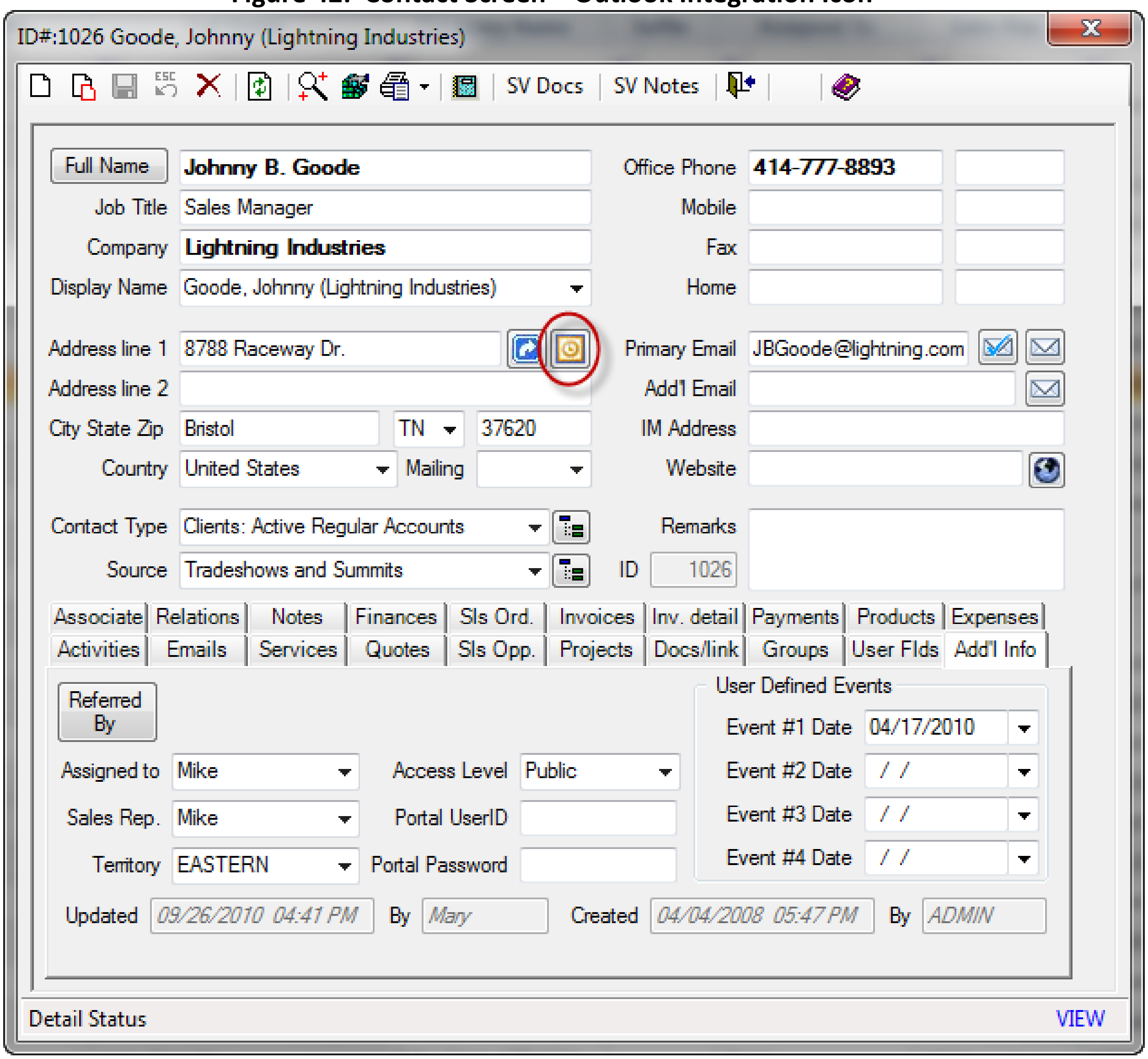
- Exporting Contacts to Outlook (Individually or by Group)
- Exporting Activities to Outlook (Individually or by Group)
- Importing Contacts to Results
- Importing Emails to Results
- Importing Appointments to Results

Exporting into Outlook

To Export an Individual Contact Record

1. From the Contact Record, click the Outlook icon:

Figure 42: Contact Screen – Outlook Integration Icon



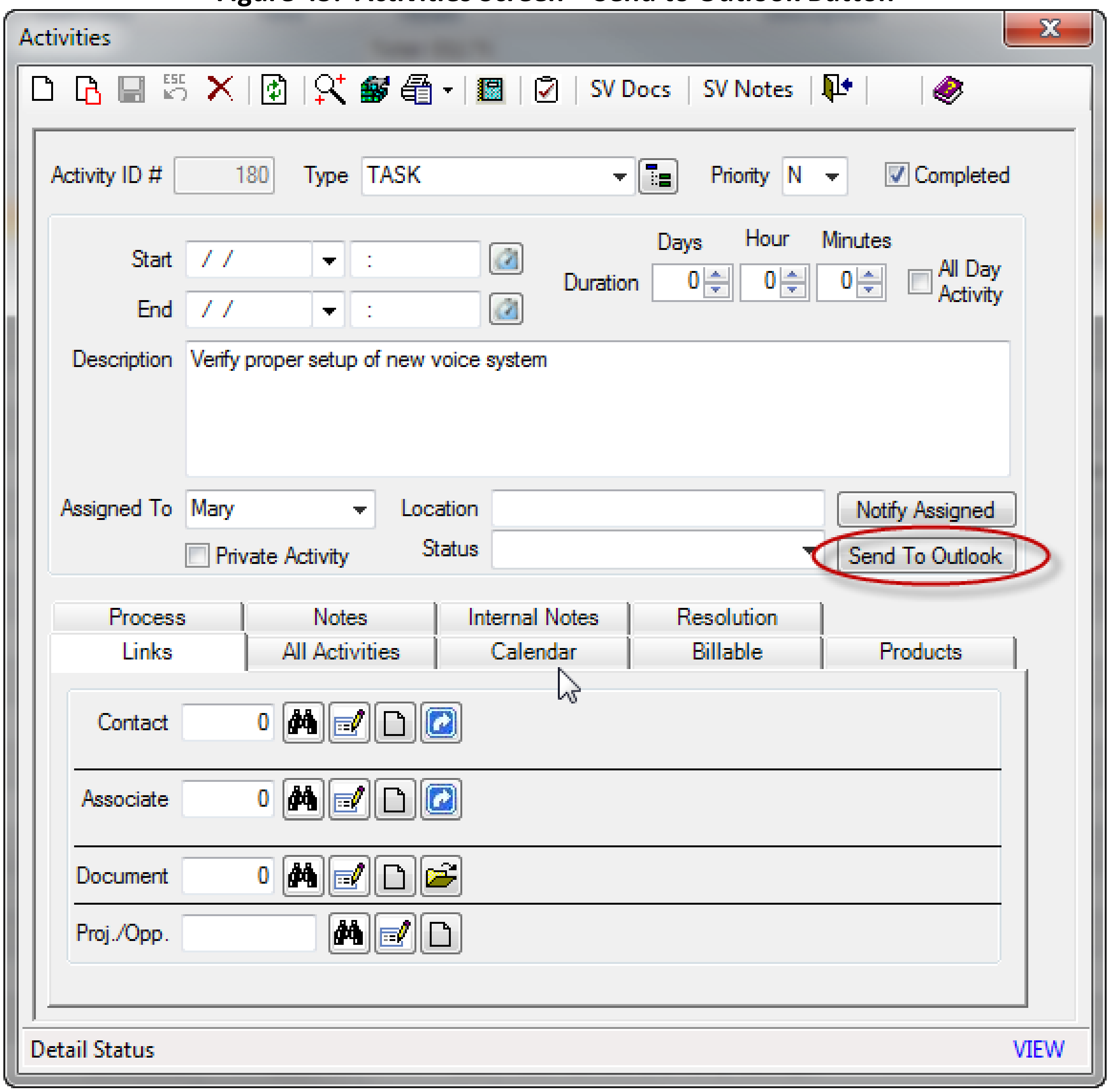
2. Outlook will automatically create a new contact with contact's main information.

3. Save & Close the Outlook record to save it to your Outlook Address Book.

To Export Individual Activities or Calendar Entries to Outlook

1. From the **Activity** screen, click the **Send to Outlook** button:

Figure 43: Activities Screen – Send to Outlook Button



2. A new appointment will automatically open in Outlook.

3. **Save & Close** the Outlook record to save it to your Outlook Calendar.

Importing From Outlook

Once Results QuickAdd is installed and configured on your computer, you can easily import emails, contacts and appointments from Outlook into Results.

Importing Emails

1. In Outlook, highlight the email(s) that you want to import into Results.
2. Click the **Results Quick Add** button on your Outlook Tool bar.

Figure 44: Results Quick-Add Button within Outlook

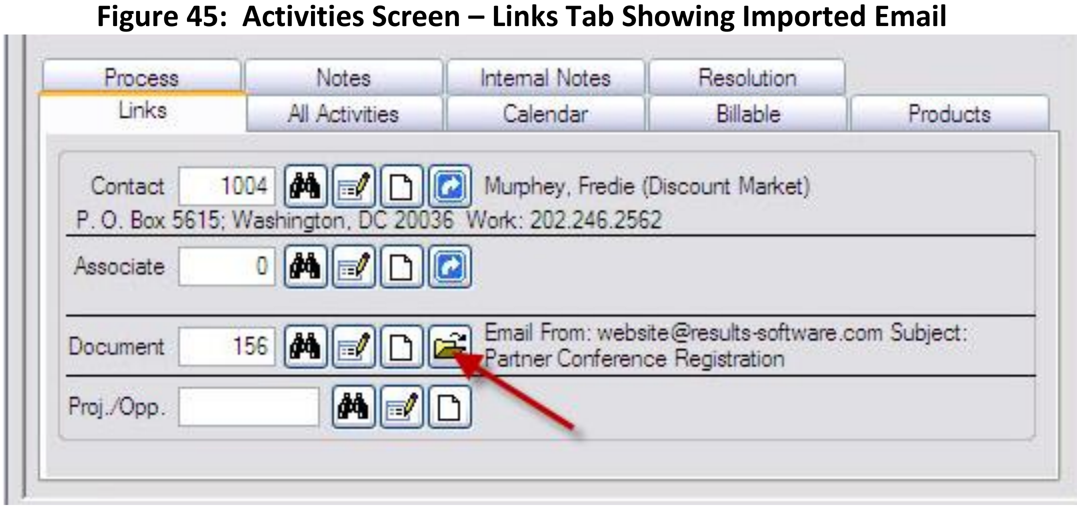
3. A message will ask you if it is OK to transfer the selected email(s) into Results. Click **OK.**

4. An **Add Activity** screen will open in Results with the appropriate Contact linked to the record. If an Activity Type is not selected, choose the appropriate type. The text of the email is saved in the notes field in the activity record and the subject line is saved in the Description field.

5. Click the  icon to save the record.

6. Once saved, the email and any attachment associated with that email will be available as a single document under the Links tab.

Figure 45: Activities Screen – Links Tab Showing Imported Email



7. The email will also appear on the appropriate Contact record under the **Emails, Activities** and the **Document/Links** tab.

Importing Contacts

1. From Outlook, highlight the contact(s) you would like to import. To highlight more than one contact at a time, hold down the Ctrl key and click on each contact of interest.

2. Click the **Results Quick-Add** button, located in Outlook's toolbar.

Figure 46: Results Quick-Add Button within Outlook

3. The selected contacts will be added to Results. New records will be created for new contacts; records will be updated for current Results contacts.

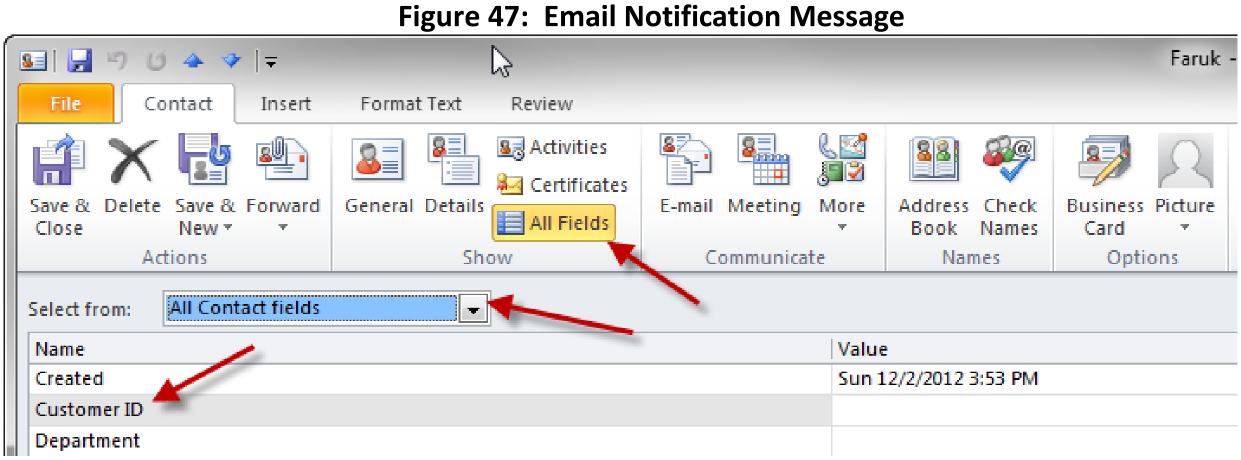
Note: For easy identification, assign the new Results contacts a specific Contact Type.

Importing Contacts as Associate Records

1. In Outlook, open the Contact record you would like to import into Results.

2. Select **All Fields** from the main menu. In the Select From field, choose **All Contact Fields.**

Figure 47: Email Notification Message



3. In the **Customer ID** field, enter the Results ContactID of the Customer.

4. In the **OrganizationalID** field, enter "?".

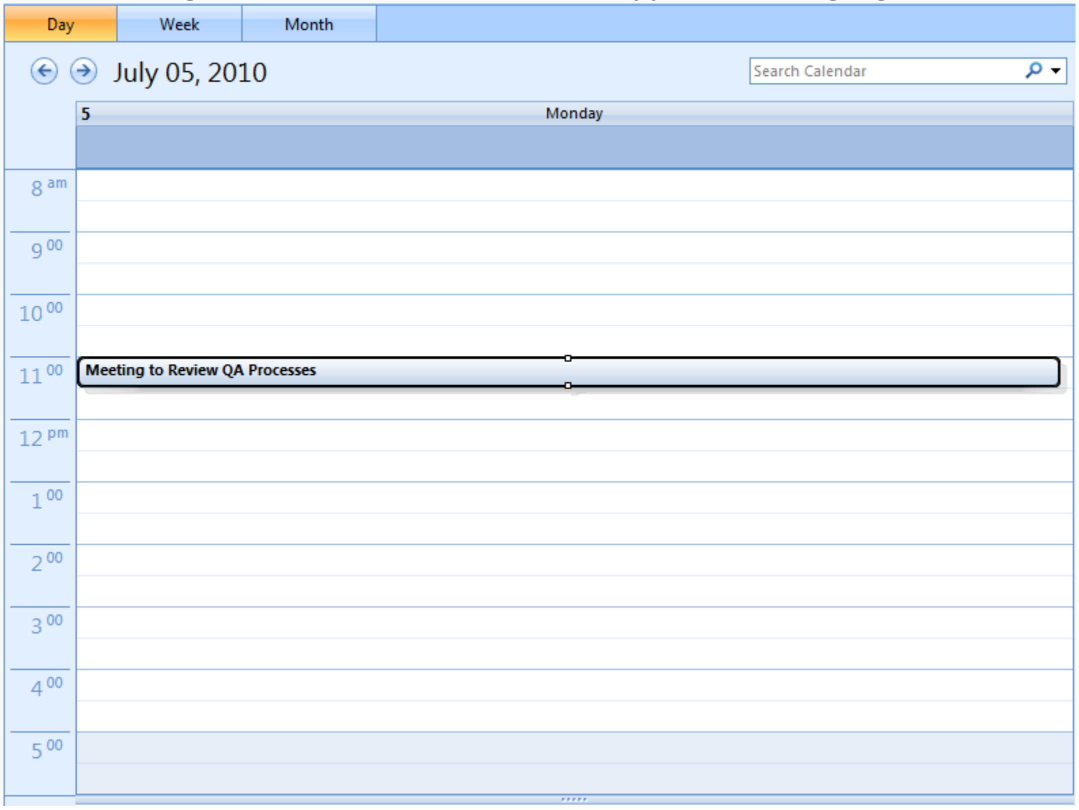
5. **Save & Close** the Outlook Contact.

6. The next time you Quick-Add that Outlook Contact record, it will appear as an Associate record of the specified Contact.

Importing Appointments or Calendar Entries

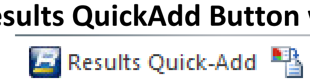
1. From Outlook, select one or more appointments you would like to import into Results.

Figure 48: Outlook Calendar with Appointment Highlighted



2. Click the **Results Quick-Add** button.

Figure 49: Results QuickAdd Button within Outlook



3. All selected Outlook appointments are added as activity records in Results.

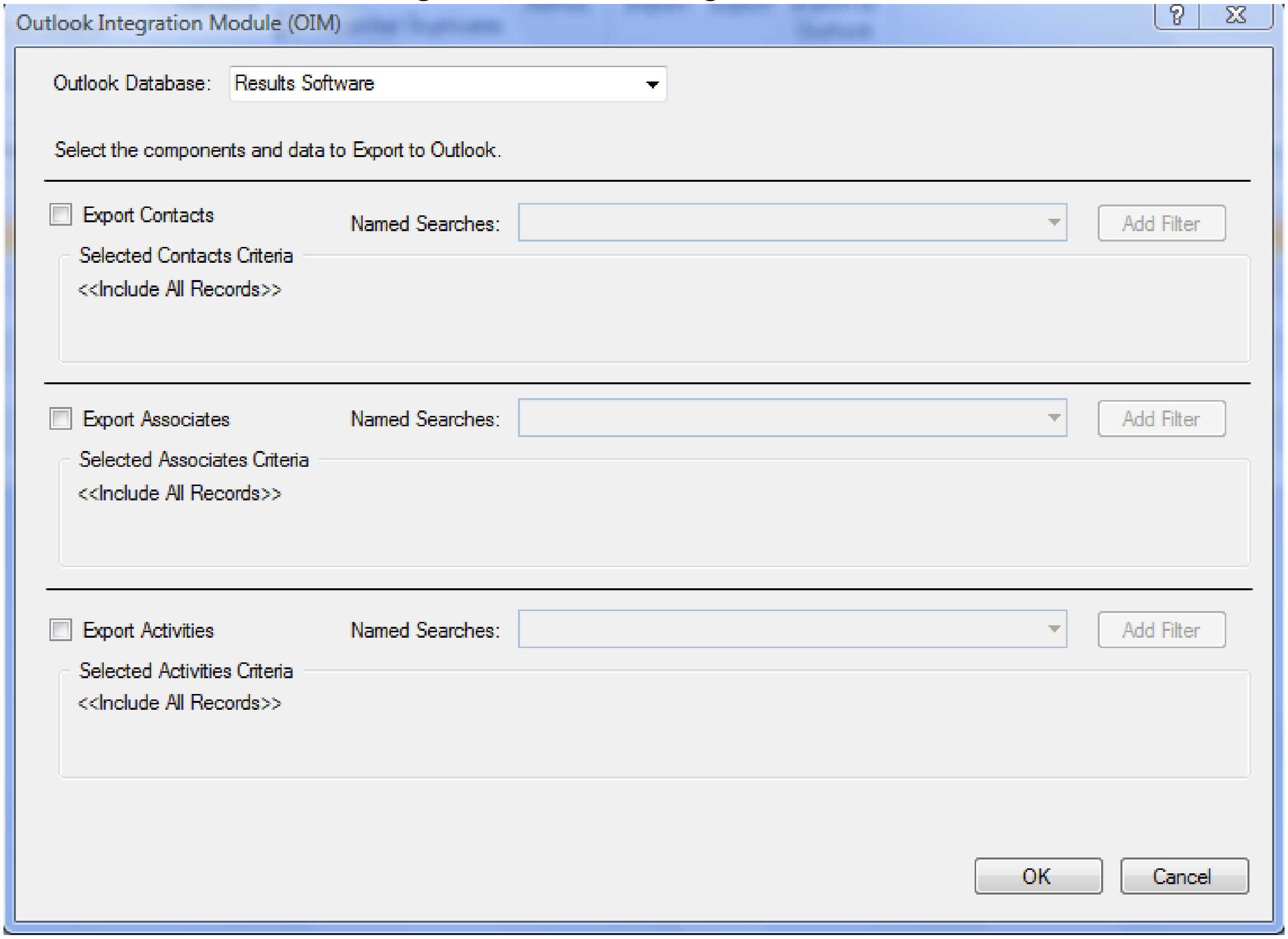
The Outlook Integration Module

The Outlook Integration Module allows users to export a number of activities, contacts and/or associate records from Results into Outlook. Users can either export all records or specific records that are identified from a Named Search.

To Use the Outlook Integration Module:

1. From the **Contacts** tab, in the **Integration** group, select **Export to Outlook**. The **Outlook Integration Module (OIM)** screen displays.

Figure 50: Outlook Integration Screen



2. Select the **Outlook Database** into which you wish to import the records.

3. Place a check in the box(es) that apply the types of records you would like to export.

4. If you would like to specify a sub-set of records, select a **Named Search** from the drop-down or select the **Add Filter** button to create a new Named Search. Refer to the section on *Creating Named Searches*.

   Note: If you do not select a Named Search, all records from all users in the database will be exported into Outlook.

5. Click the **OK** button.

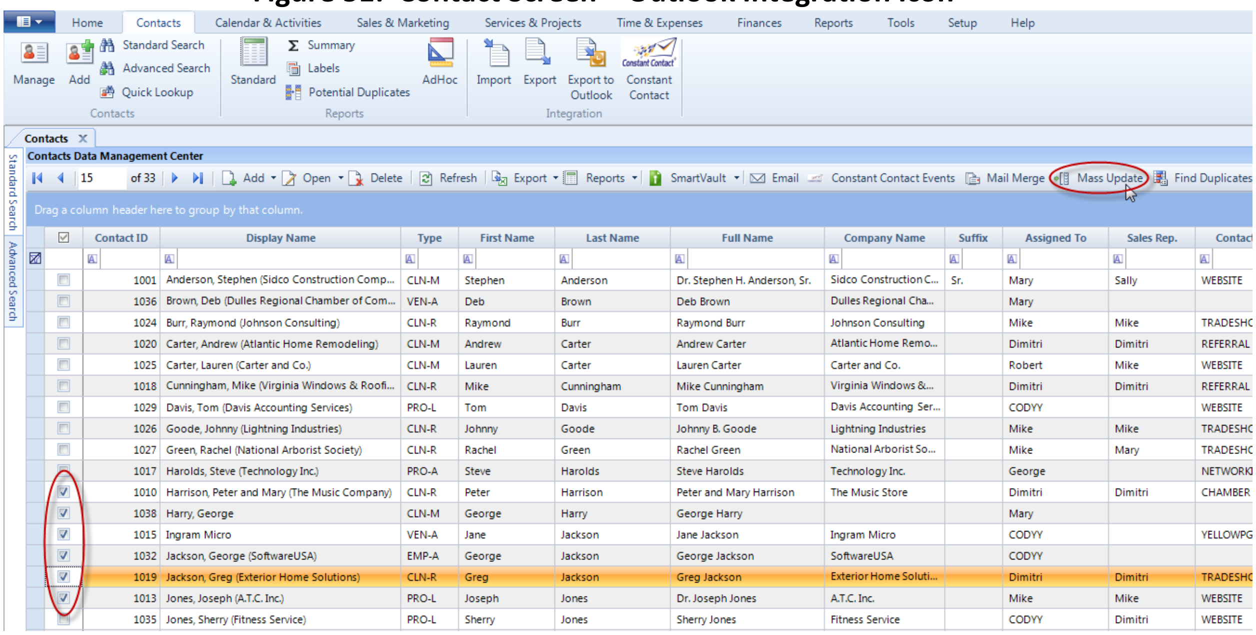
Mass Updating Records

The Mass Update feature allows users to quickly update several selected contact records. Users can update fields and Add or Delete contact records from Groups. In addition, users can create Activities or Service Orders for the selected records.

How to Update Fields in Several Contact Records

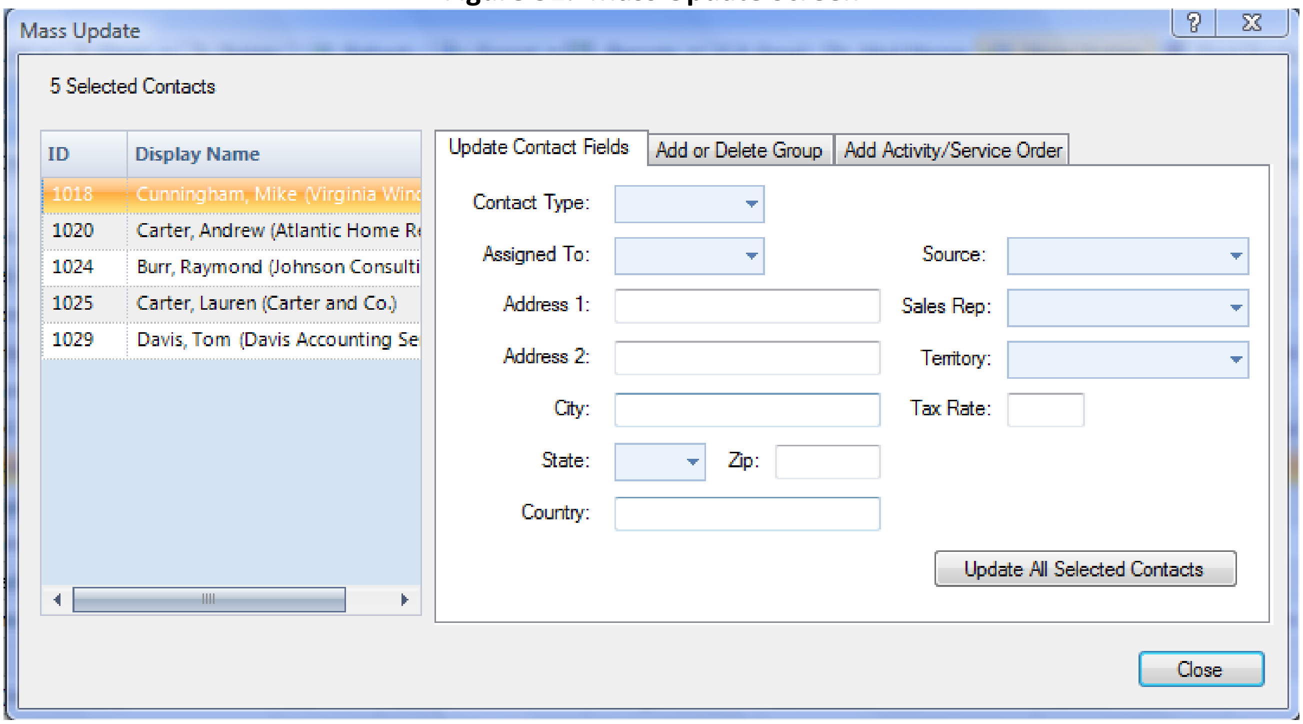
1. From the Contact Management DMC, select the records you would like to include in the Mass Update by placing a check in the boxes associated with the records you would like to change.

Figure 51: Contact Screen – Outlook Integration Icon



2. Select the **Mass Update** button in the DMC toolbar. The following screen appears.

Figure 52: Mass Update Screen



3. Populate the fields that you would like to update among all the records displayed on the left hand side of the screen.

4. Select the **Update All Selected Contacts** button.

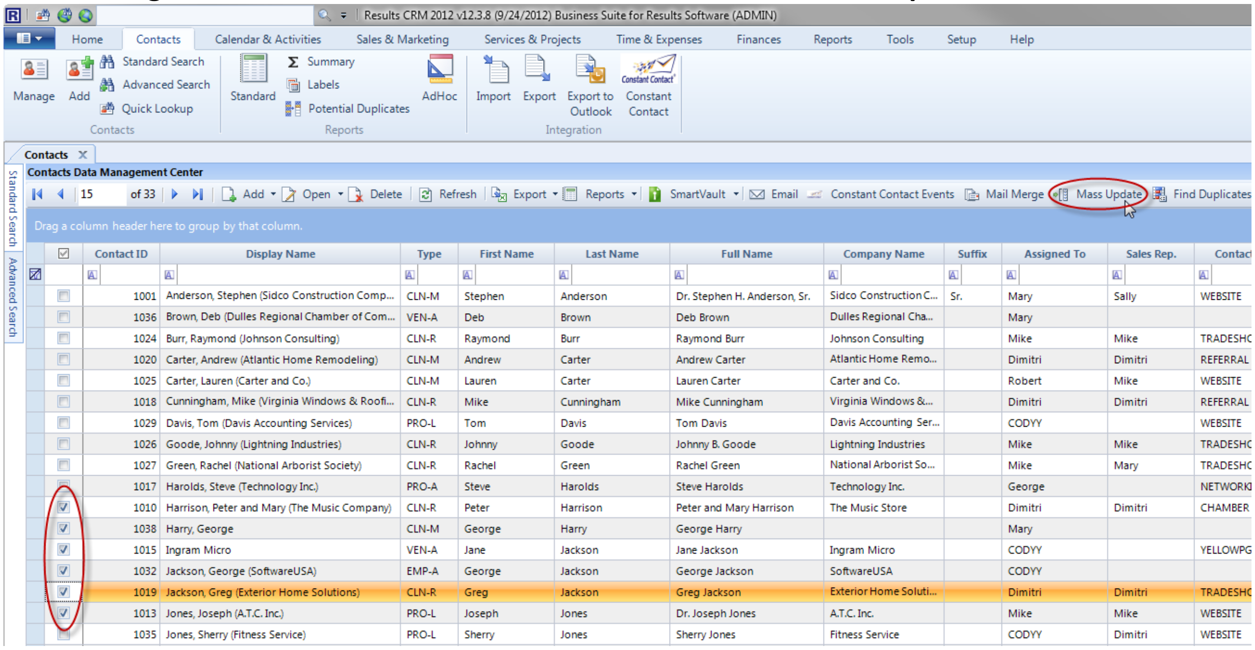
5. All records will be changed to reflect the new information.

Note: When a Contact Type is updated, you can decide to trigger associated Processes for each Contact record that is updated with the new Contact Type.

How to Add or Delete Groups on Several Contact Records

1. From the Contact Management DMC, select the records you would like to include in the Mass Update by placing a check in the boxes associated with the records you would like to change.

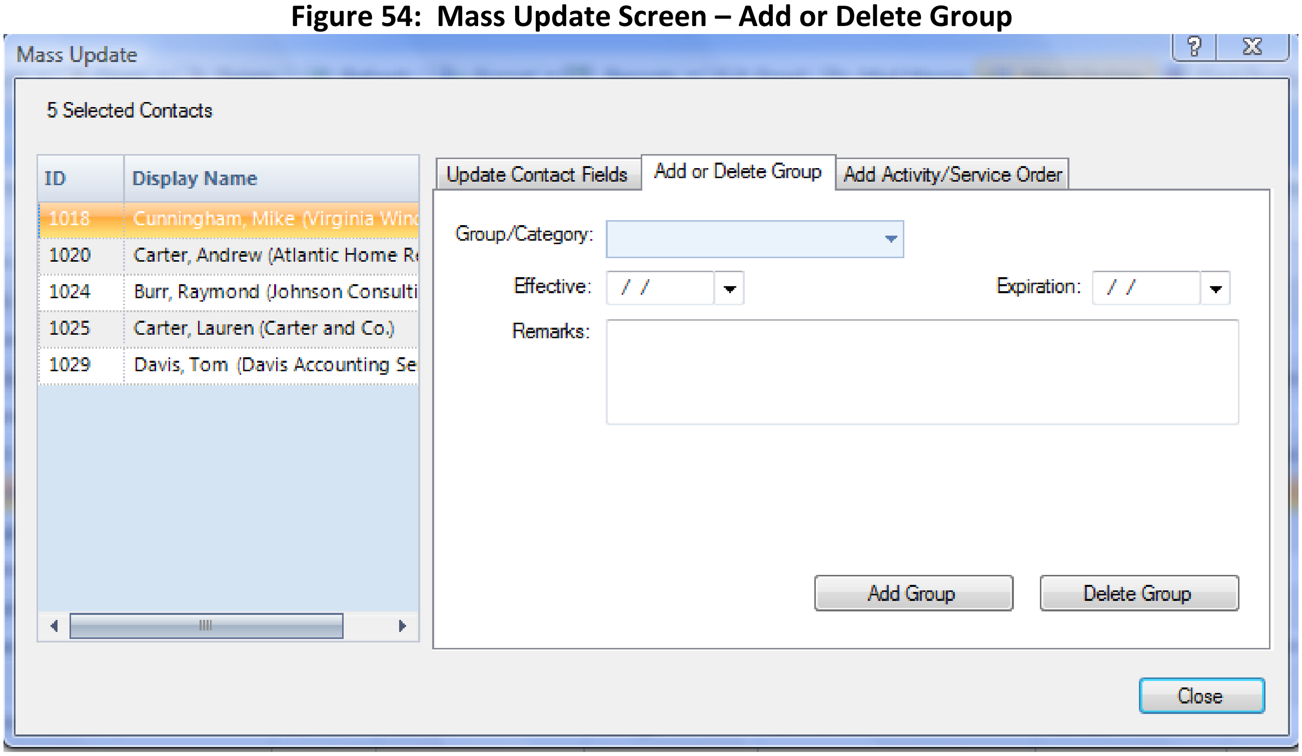
Figure 53: Contacts DMC with Records Selected for Mass Update Screen



2. Select the **Mass Update** button.

3. Navigate to the **Add or Delete A Group** tab. The following screen appears:

Figure 54: Mass Update Screen – Add or Delete Group



4. Select the **Group** you would like to add or delete from the contact records on the left hand side of the screen. Fill out the other fields as necessary.

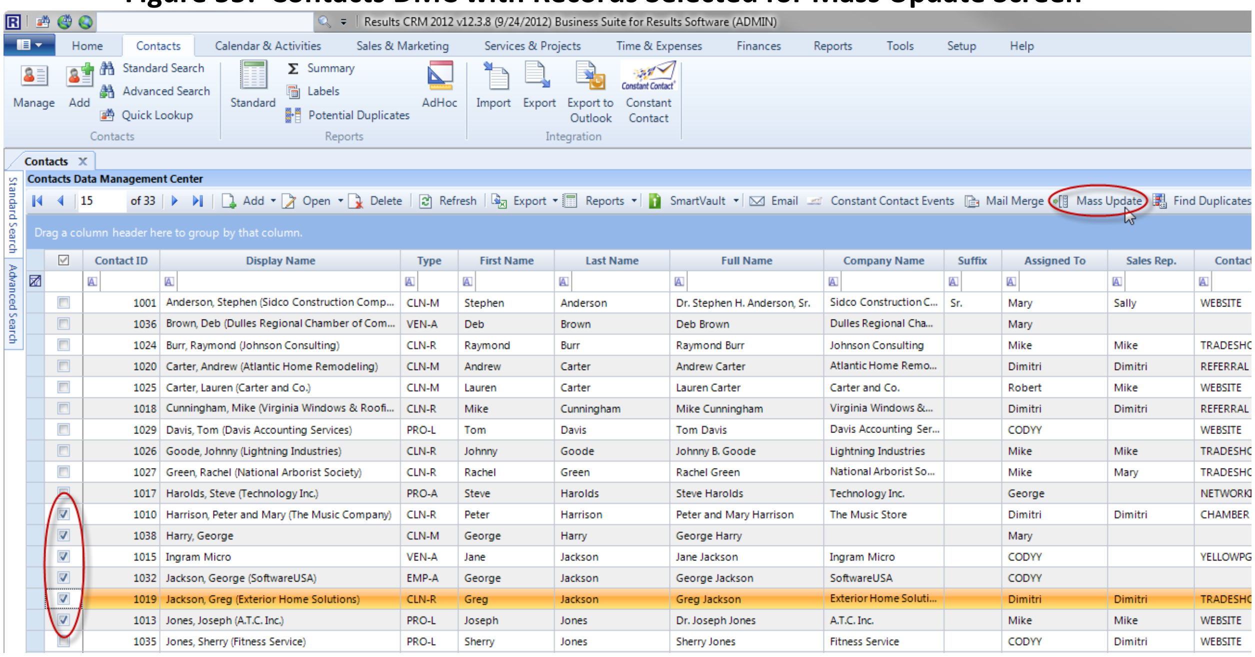
5. Select the **Add Group** to instantly assign the selected contacts to a group or select the **Delete Group** to remove the selected contacts from a group.

6. All records will be changed to reflect the new information.

How to Add Activities or Service Orders for Several Contact Records

1. From the Contact Management DMC, select the records you would like to include in the Mass Update by placing a check in the boxes associated with the records you would like to change.

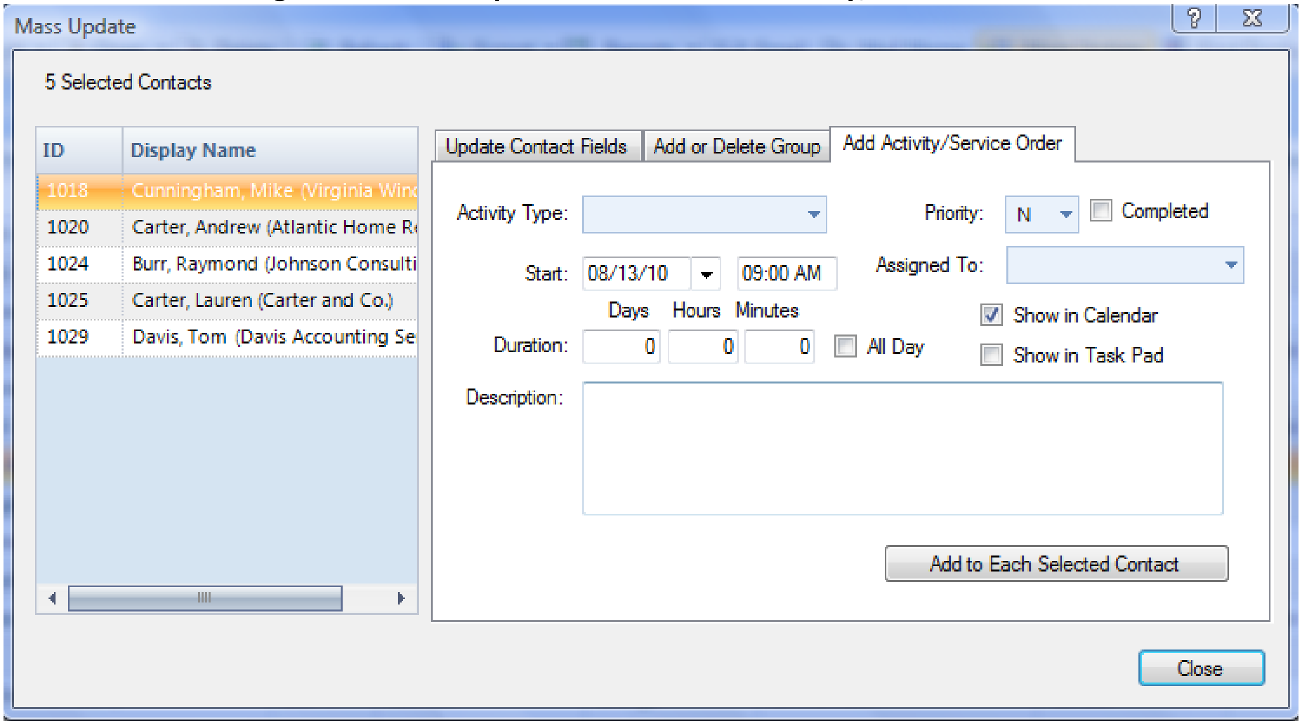
Figure 55: Contacts DMC with Records Selected for Mass Update Screen



2. Select the **Mass Update** button.

3. Navigate to the **Add Activity/Service Order** tab. The following screen appears.

Figure 56: Mass Update Screen – Add Activity/Service Order



4. Populate the fields for the Activities or Service Orders you would like to create for the selected contacts.

5. Select the **Add to Each Selected Contact button** to create a similar Activity or Service Order record for each of the selected contacts.

Mass Renewal Module

The Mass Renewal module allows you to quickly identify expiring memberships or maintenance contracts and automatically generate invoices for the associated members or customers.

Setting Up the Mass Renewal Module for Use

Before you use this module, you will need to ensure that you have established Product Types and Groups for the various types of memberships or contracts you offer. The following screen shots show an example of a company offering Memberships, including a discounted "Student Membership".

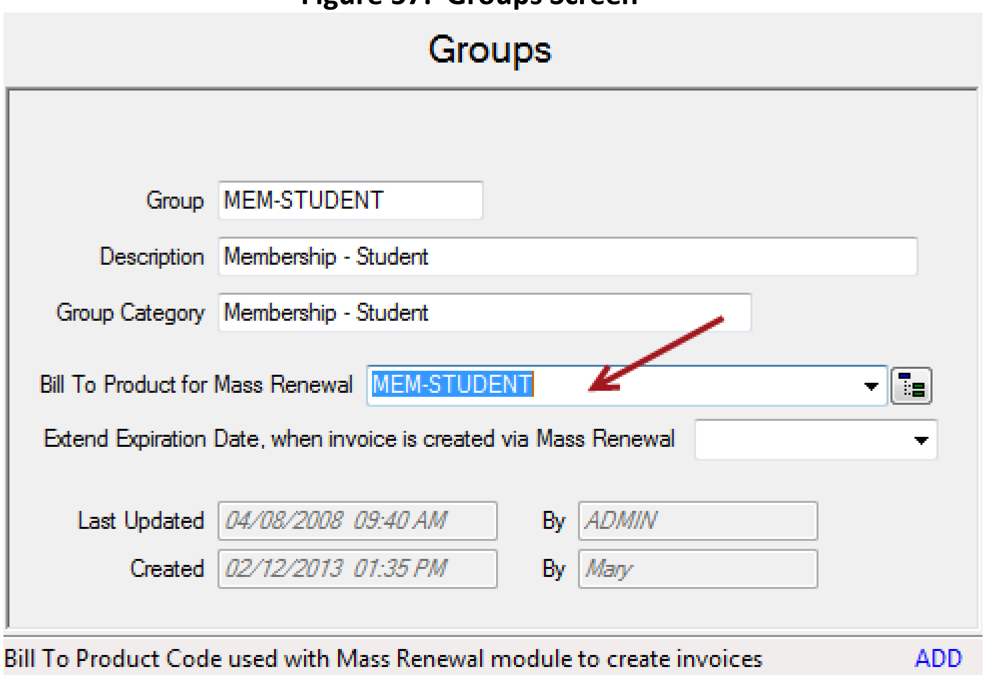
1. If you have not done so already, add the appropriate Product Types that will appear on your invoices. Please refer to *How to Add a Product* for step-by-step instructions.

2. Setup Groups for your Mass Renewal Products:

    a. On the **Set Up** tab, in the **Maintain Lookup Values** group, click **Contacts** and then select **Groups**.

    b. Click the **Add** icon to add a new entry.

Figure 57: Groups Screen



    c. Fill out the **Group, Description**, and **Group Category** fields.

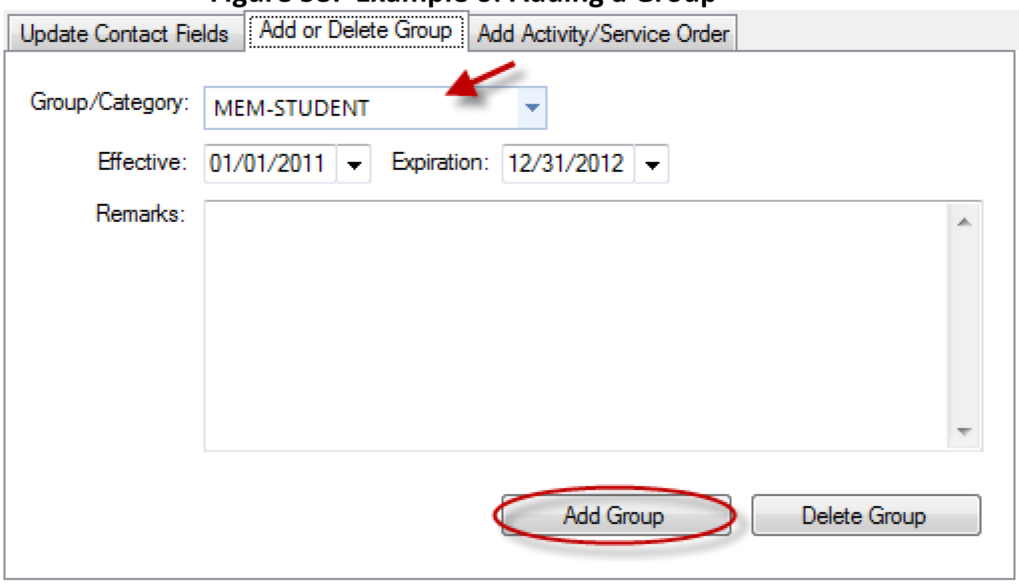
d. Select the products that were identified in Step 1 in the **Bill To Product For Mass Renewal field**.

e. Click the **Save** icon to save the record.

4. Use Mass Update to add contacts into the new groups you have created. Please refer to [How to Add or Delete Groups on Several Contact Records](#).

   The following screen displays an example of the Effective and Expiration dates for the new "MEM-Student" group.

Figure 58: Example of Adding a Group

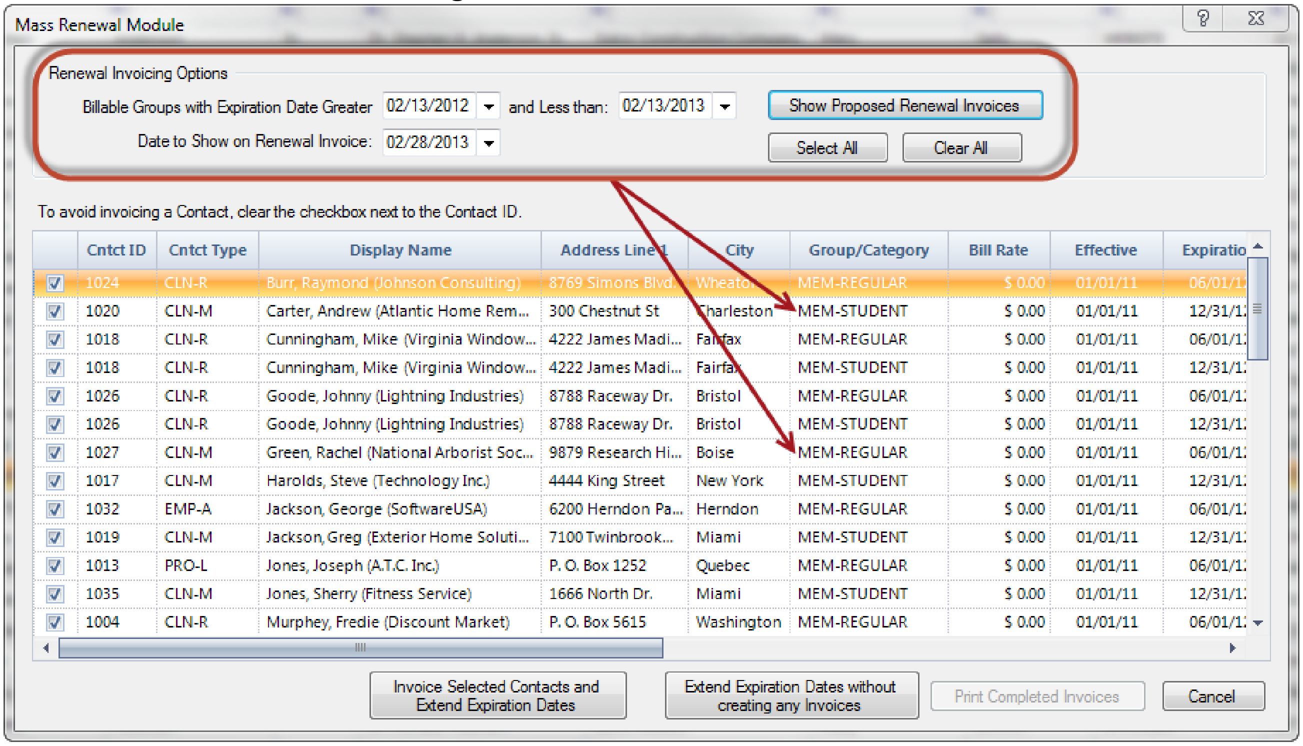


Using the Mass Renewal Module

Before using the Mass Renewal Module, you must ensure that you have completed all steps in [Setting Up the Mass Renewal Module for Use](#) section.

1. On the **Finances** tab, in the **Invoices** group, click **Mass Renewal.** The figure below displays the Mass Renewal screen.

Figure 59: Mass Renewal Module



2. Enter in the date range for the Expiration Dates.

3. Enter in a **Date to Show on Renewal Invoice**.

4. Select the **Show Proposed Renewal** Invoices button. Based on your date range, a list of proposed invoices will appear below.

5. To view the activities before the invoice is created, select the **View** button associated with each record.

6. If you do not want to invoice a particular contact, uncheck the box in the first column of the grid that is associated with that record. Note: You can also use the **Select All** and **Clear All** buttons as appropriate to select your desired records.

7. Press either the **Invoice Selected Contacts and Extend Expiration Date** button. You will notice the **Invoice ID**, **Invoice Amount** and **Tax Amount** columns of the selected records will now be populated.

8. To preview any of the invoices, push the **View** button associated with the record.

9. Press the **Print Completed Invoices**.

Documents & Attachments

Frequently accessed company documents or customer specific documents can be stored and managed in Results.

Note: SharePoint and ShareFile users can use this module to link to documents stored in these products. Please refer to the *ShareFile Integration* and *SharePoint Integration* chapter for more details.

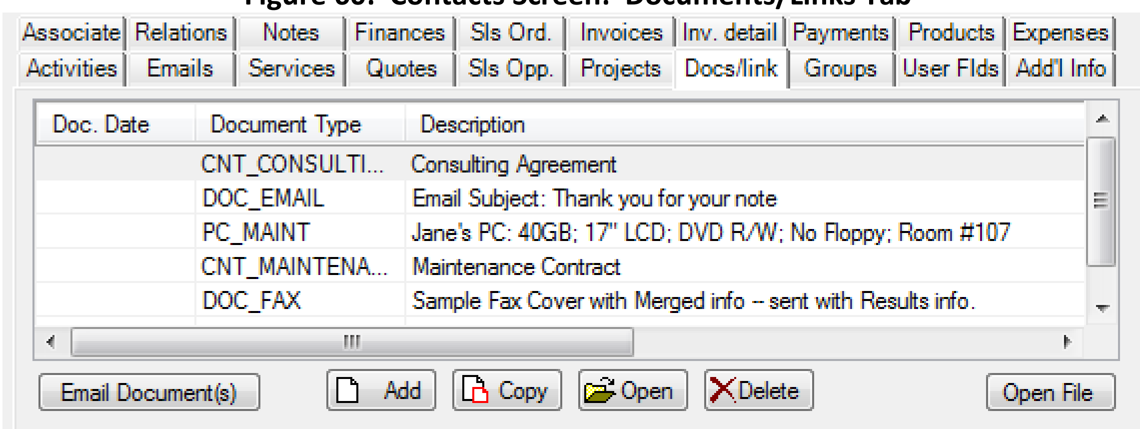
Note: SmartVault users can use the SmartVault Integration module to scan, upload and view documents. Please refer to the *SmartVault Integration* chapter for more details.

How to Attach a Document to a Contact Record

1. Open a Contact Record. (For more information, refer to *How to Open an Existing Contact Record*.)

2. Navigate to the **Docs/Links** tab.

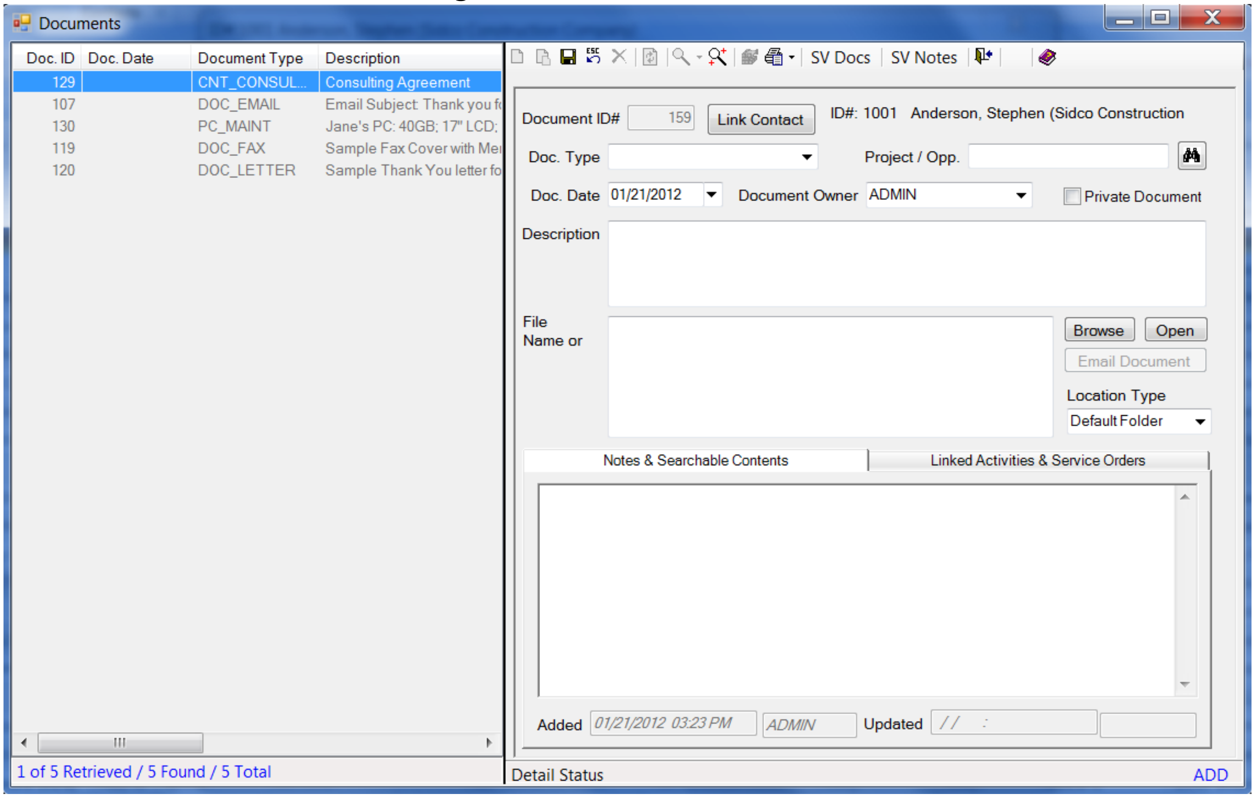
Figure 60: Contacts Screen: Documents/Links Tab



3. Click the **Add** button.

4. The **Documents** screen will appear with the Link Contact information. **Note:** Documents already associated with this Contact will appear in a grid on the left side of the screen.

Figure 61: Documents Screen



5. Choose an appropriate **Document Type.**

6. If applicable, choose to link the document to a **Project or Sales Opportunity** by clicking the binocular icon.

7. The **Doc Date** will default to today's date. Change this field if necessary.

8. Type in a **Description** of the Document.

9. Click the **Browse** button to locate and select the file you wish to link to Results.

10. The **File Name or URL** box will auto-populate with the name of the attached document. If necessary, change the information in this field.

11. Click the  icon to save the record.

12. Close the screen. The new document will appear under the **Docs/Link** tab of the appropriate contact.

Note: In order for the document to be accessed by all Results users, it must be stored on your network. If the document is stored on your local PC, it will only be available to you.

How to Link a Document to an Activity or Service Order

1. On the **Services & Projects** tab, in the **Documents** group, click **Manage**.

2. From the **Document Management Data Management Center** toolbar, click the **Add** button.

3. The **Add Documents** screen will appear. Choose an appropriate **Document Type.**

4. If applicable, choose to link the document to a Project or Sales Opportunity by clicking the binocular icon.

5. The **Doc Date** will default to today's date. Change this field if necessary.

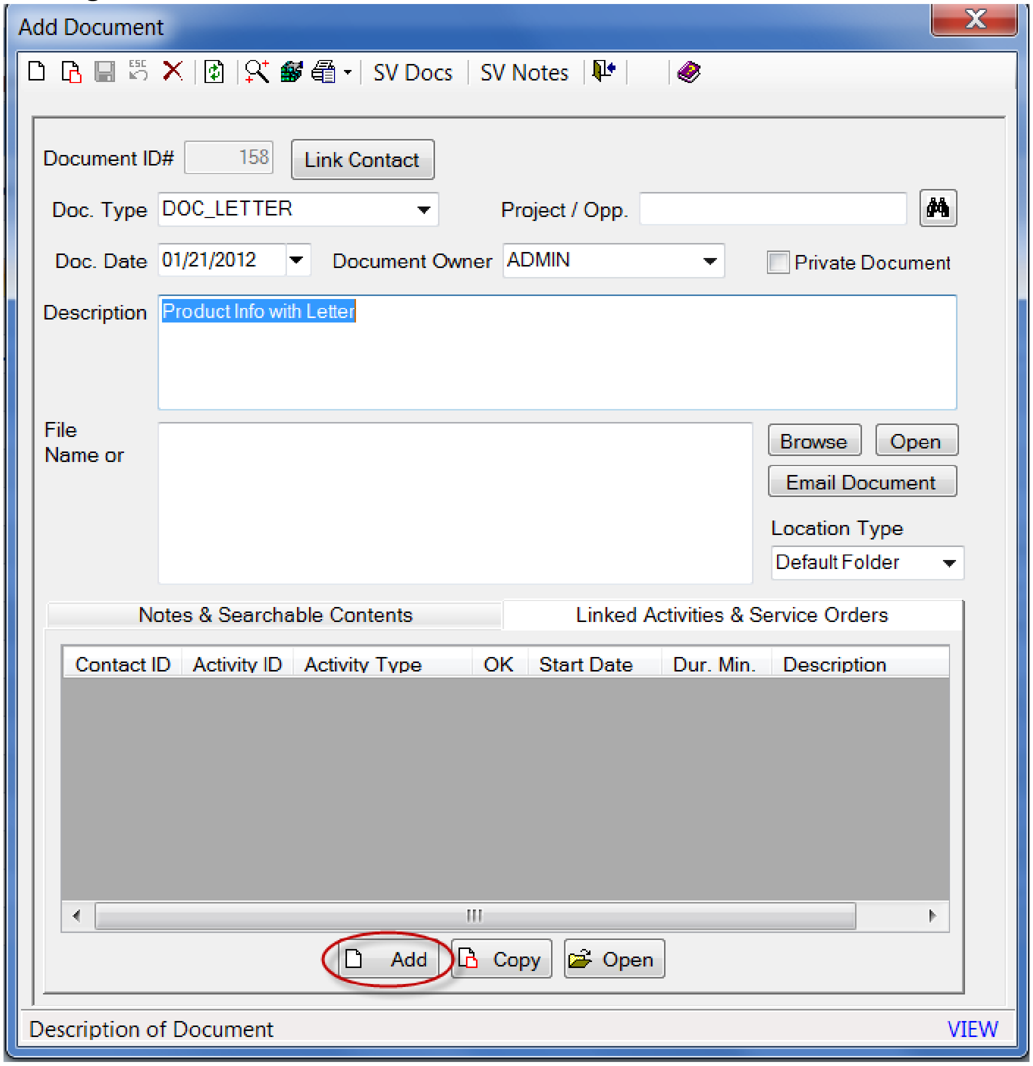
6. Type in a **Description** of the Document.

7. Click the **Browse** button to locate and select the file you wish to link to Results.

8. The **File Name or URL** box will auto-populate with the name of the attached document. If necessary, change the information in this field.

9. Navigate to the **Linked Activities & Service Order** tab and click the **Add** button.

Figure 62: Document Screen: Linked Activities & Service Orders Tab



10. Fill the out the Activities screen as described in the Activity and Service Order sections of this manual. Click the icon to save the record and then close the screen.

11. You will return to the **Documents** screen. The new Activity or Service Order will now display under the **Linked Activities & Service Orders** tab. Click the icon to save the record.

12. Close the screen. The new document will appear under the **Docs/Link** tab of the appropriate contact.

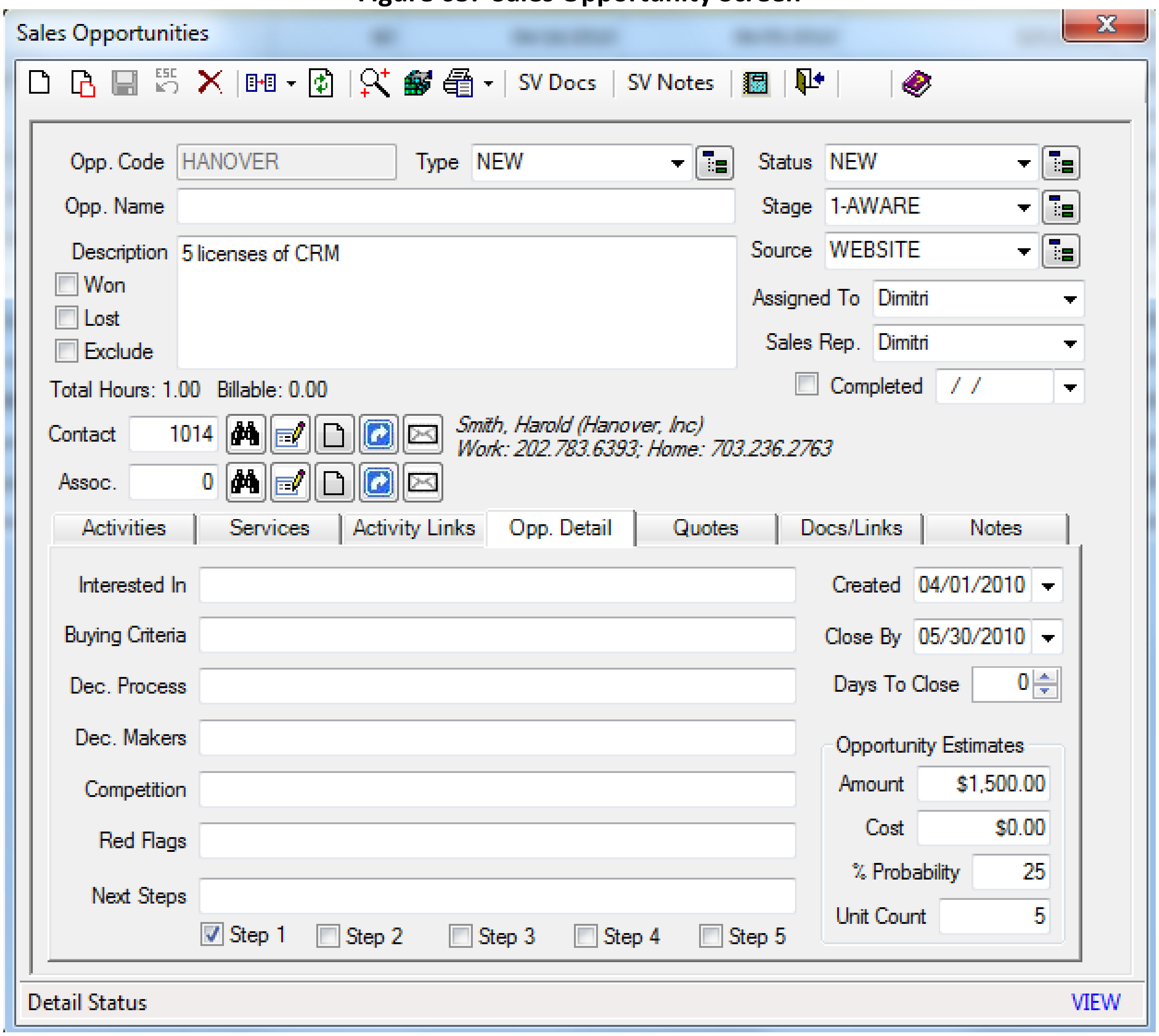
Note: In order for the document to be accessed by all Results users, it must be stored on your network. If the document is stored on your local PC, it will only be available to you.

Sales Opportunities

The sales opportunity module offers a central place to see detailed information about the sale opportunities or prospects you are tracking. In addition to capturing general information and status, you can track the specific statuses, activities, documents, notes and quotes associated with each account.

The screen below displays a sample Sales Opportunity for installing a new IT network.

Figure 63: Sales Opportunity Screen



Tab Name	What does it show about the sales opportunity?
Activities	Past or future appointments, meetings, and tasks.
Services	Past or future Service Orders related to the Opportunity.
Activity Links	A list of contacts that are associated with the activities listed on the Activity tab.

Opportunity Detail	Captures information about the decision making process and estimates associated with the Sales Opportunity.
Quotes	Associated Quotes. (You can also add, edit or sort from this tab.)
Doc/Links	Associated documents and files such as proposals, contracts, images, etc.
Notes	Notes about the Sales Opportunity. (Searches can be performed on the contents of this field.)

How to Add a Sales Opportunity

1. On the **Sales & Marketing** tab, in the **Sales Opportunity** group, click **Add**.

2. The **Opp Code** will be filled out for you based on what is defined in the Configuration options. (Refer to *How to Change Configuration and Set Up Options*.)

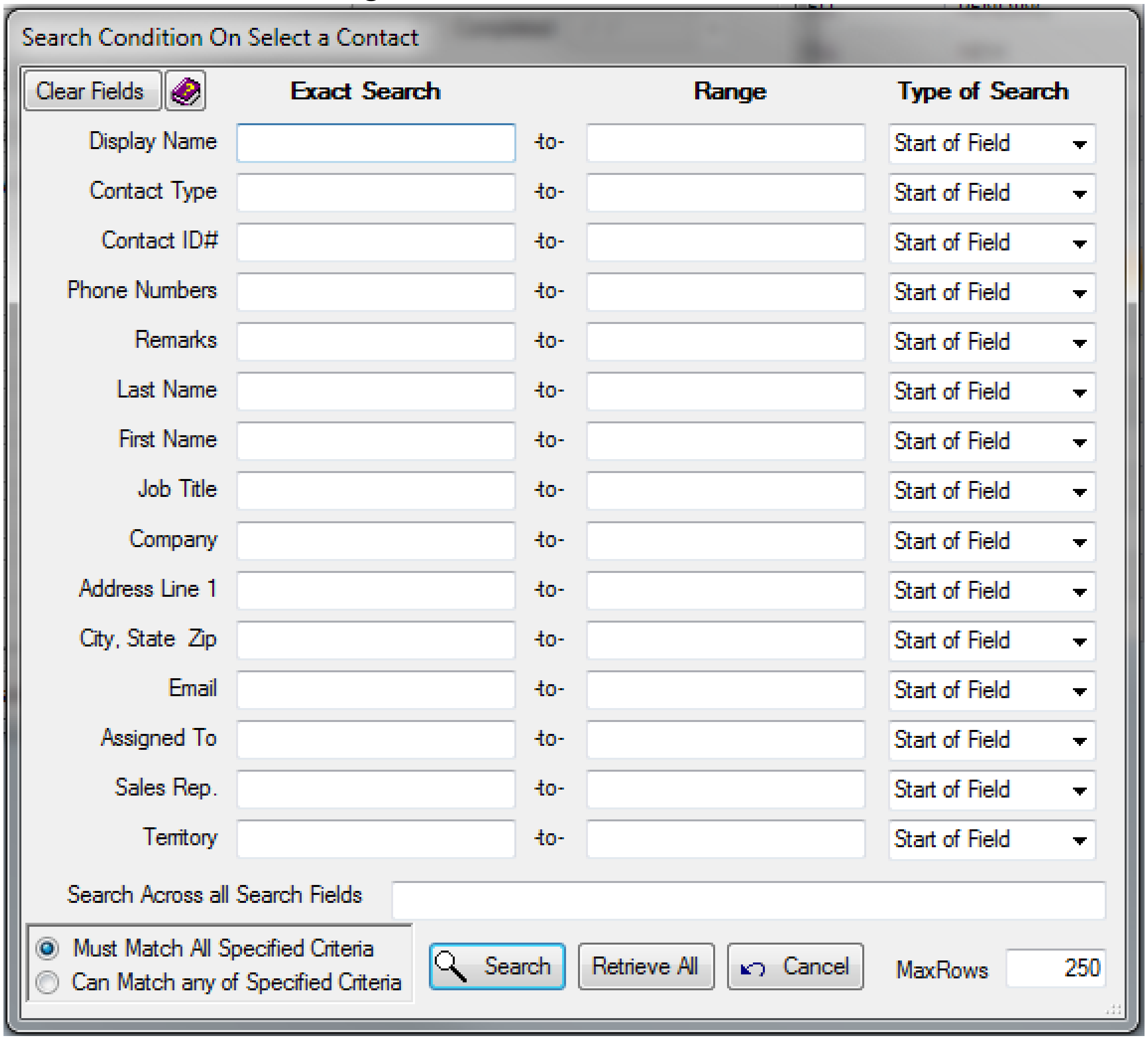
3. In the top portion of the screen, enter the information that you would like included in the Sales Opportunity.

4. To link a Contact to this opportunity, type in the Contact ID.

   OR

   To search for a contact, click the binocular icon . Enter your search criteria into the appropriate fields on the Search Condition Screen and click **Search.** Once the search results display, double-click on the desired Contact.

Figure 64: Search Condition Screen



5. To link an associate record to the Sales Opportunity, type in the Associate ID or click the binocular icon and follow the steps described above for searching for records.

6. After returning to the Sales Opportunity, click the  icon to save the record.

How to Open an Active Sales Opportunity

The Sales Opportunity DMC automatically displays all active Sales Opportunities.

1. On the **Sales & Marketing** tab, in the **Sales Opportunity** group, click **Manage**. The **Sales Opportunity Data Management Center** will appear.

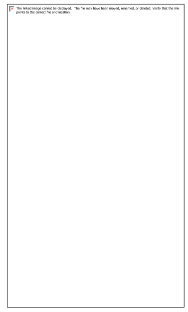
2. Conduct a search for the Sales Opportunity.

3. Double-click on the Sales Opportunity you would like to open.

How to View ALL Sales Opportunities in the DMC

When the **Won**, **Lost,** or **Exclude** fields are checked on a Sales Opportunity data entry screen, the Sales Opportunity will be considered "inactive" and will not automatically be included on the Sales Opportunity DMC.

Figure 65: Fields that Indicate Inactive Sales Opportunities



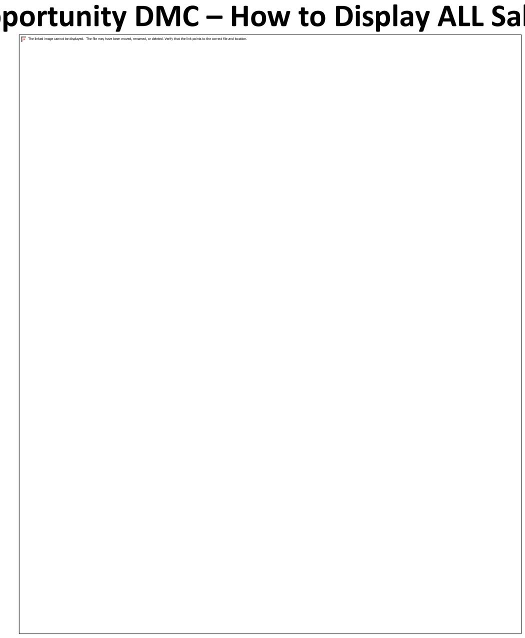
To view ALL Sales Opportunities from within the DMC:

1. On the **Sales & Marketing** tab, in the **Sales Opportunity** group, click **Manage**. The **Sales Opportunity Data Management Center** will appear.

2. Click on the **Standard Search** tab.

3. Uncheck the **Include Active Sales Opportunities** option.

Figure 66: Sales Opportunity DMC – How to Display ALL Sales Opportunities



4. Click **Apply**.

5. The Sales Opportunity DMC will display all Sales Opportunities in your database.

How to View Won and/or Lost Sales Opportunities ONLY

1. On the **Sales & Marketing** tab, in the **Sales Opportunity** group, click **Manage**. The **Sales Opportunity Data Management Center** will appear.

2. Click on the **Standard Search** tab.

3. Uncheck the I**nclude Active Sales Opportunities** option.

4. Check the **Include Won Sales Opportunities** and/or the **Include Lost Sales Opportunities** options, as needed

5. Click **Apply**.

6. The Sales Opportunity DMC will display the Sales Opportunities meeting your search criteria.

Converting Sales Opportunities to Projects

Sales Opportunities can be converted to Projects from the Quotes screen. Please refer to the Quotes chapter for more information on this topic.

Graphing Sales Opportunities

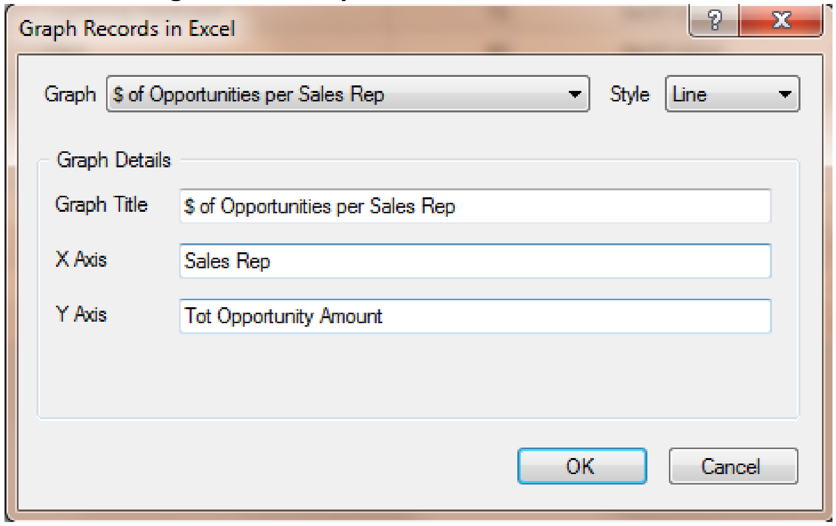
1. On the **Sales & Marketing** tab, in the **Sales Opportunity** group, click **Manage**. The **Sales Opportunity Data Management Center** will appear.

2. Conduct a search for the Sales Opportunities you would like to graph.

3. Place a check next to the records in the DMC that you would like to graph and click the **Graph** button on the DMC toolbar. **Note**: To graph all records in the DMC, simply click the **Graph** button.

4. The **Graph Records in Excel** screen will appear. Select a **Graph** and **Style**.

Figure 67: Graph Records in Excel Screen



5. Change the **Graph Details** as necessary and click **OK**.

6. Excel will open with your graph displayed. Use Excel to change the color and look of your graphs as necessary.

Configuring Sales Opportunity Codes

The Sales Opportunity Code that appears on the Sales Opportunity screen can be configured using the Configuration Options screen.

Note: If you decide to change the way this field is configured, you would need to make the corresponding change in every INI file on the server (while the users are **not** in the system) or have each user change it from the Configuration Options screen.

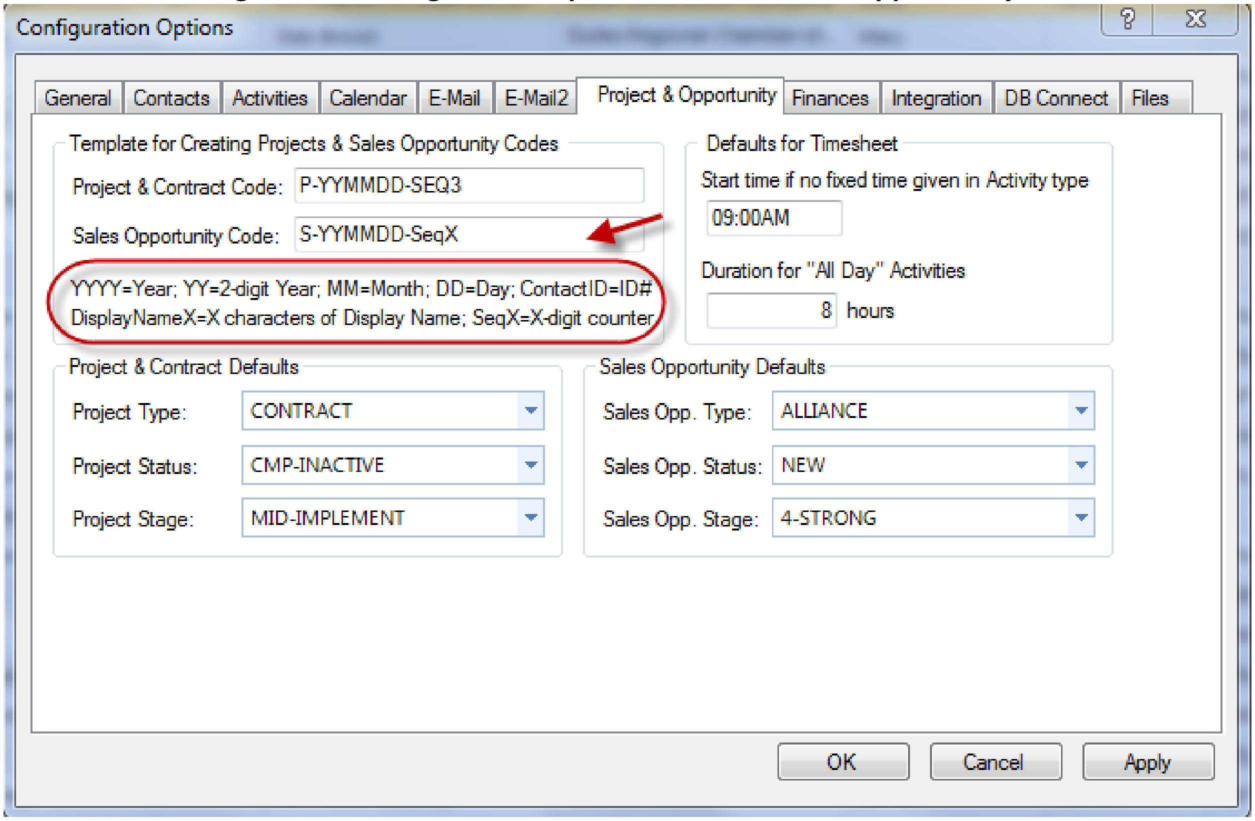
To Configure Sales Opportunity Codes:

3. On the **Tools** tab, in the **Configuration** group, click **Options**. The **Configuration Options Screen** will appear.

4. Navigate to the Project & Opportunity tab.

5. Use the key provided on this screen to configure a new code structure. Type the configuration into **Sales Opportunity Code** the field.

Figure 68: Configuration Options Screen – Sales Opportunity Code



13. Click **Apply**.

In the example above, when an Opportunity is added, the code will have the letter “S-“, followed by the two digit year, the two digit month, and the two digit day of the month. This will be followed by a hyphen and the ContactID. If you expect to add more than one opportunity for the same Contact on the same day, the Code would no longer be unique after the first Opportunity is added.

To support multiple opportunities in a single day, use the SEQX in the structure of the Opportunity Code. For example, if you use “YYMMDD-ContactID-SEQ3”, it will support up to 999 unique opportunities per Contact. Use SEQ2 instead of SEQ3, to support up to 99 unique codes per day per contact.

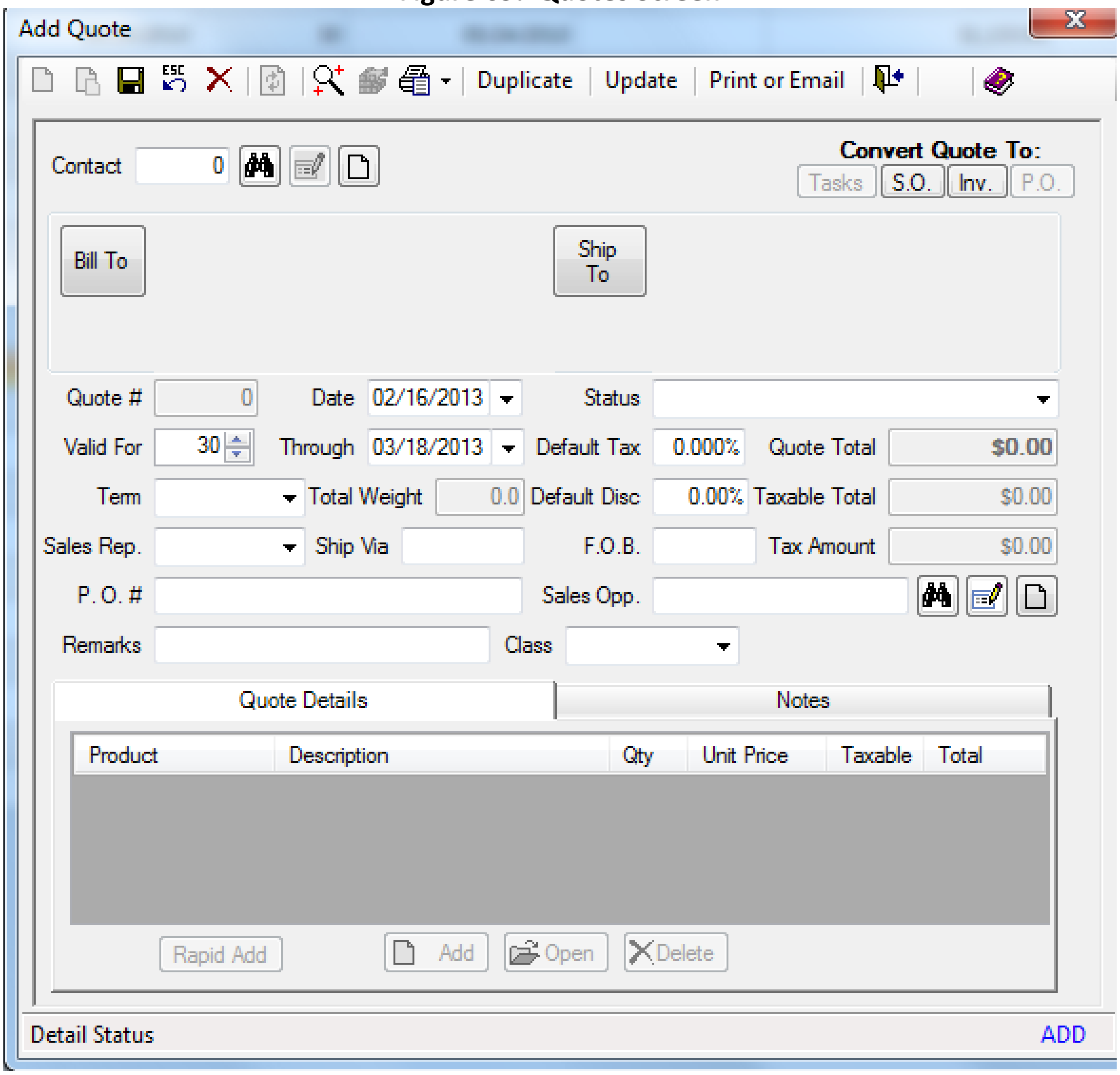
Quotes

The quotes module offers the ability to create, edit and send quotes.

How to Create a Quote

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Add**. The figure below displays the Quote screen.

Figure 69: Quotes Screen



2. To search for an existing Contact, select a **Search** icon next to the Contact field OR to add a new contact record, click the **New** icon next to the Contact field.

3. The selected or added Contact will automatically populate the **Bill To** and **Ship To** addresses based on what is identified on the Contact screen's Finance Tab. To change

either of these, click the respective buttons. A list of Associate records for the selected Contact will appear. Double-click the desired address.

4. Fill in appropriate information on the top portion of the Quote screen.

5. Click the icon to save the record. The buttons in the Quote Detail part of the screen will now become available.

6. Choose one of the following ways to add line items to the quote:

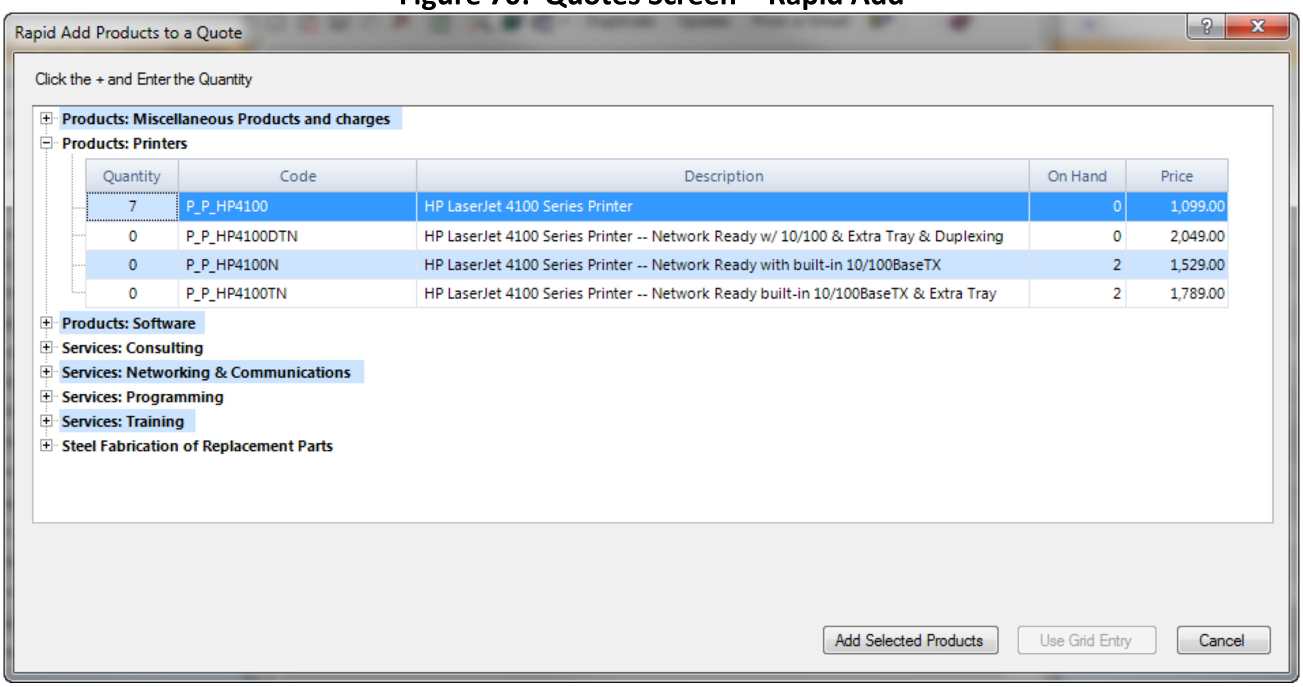
    a. **Via the "Rapid Add" button:**

        i. Click the **Rapid Add** button and select the products you would like to appear on the quote. **Note:** Once the screen is open, the system will quickly find the desired product when you start typing the first letters of the product name.

        ii. Change the quantity of items displayed on the quote in the Qty column associated with the product you would like to add.

        iii. Click the **Add Selected Products** button.
        Note: After you have returned to the Quote Screen, you can change the Quantity or the Price by highlighting the item in the Quote Details grid and double-clicking the item to open the Product Details screen.

Figure 70: Quotes Screen – Rapid Add



Note: The **Use Grid Entry** button provides another way to enter data in a Grid View. Once data is entered on a screen, you cannot switch views as the button will be temporally grayed out.

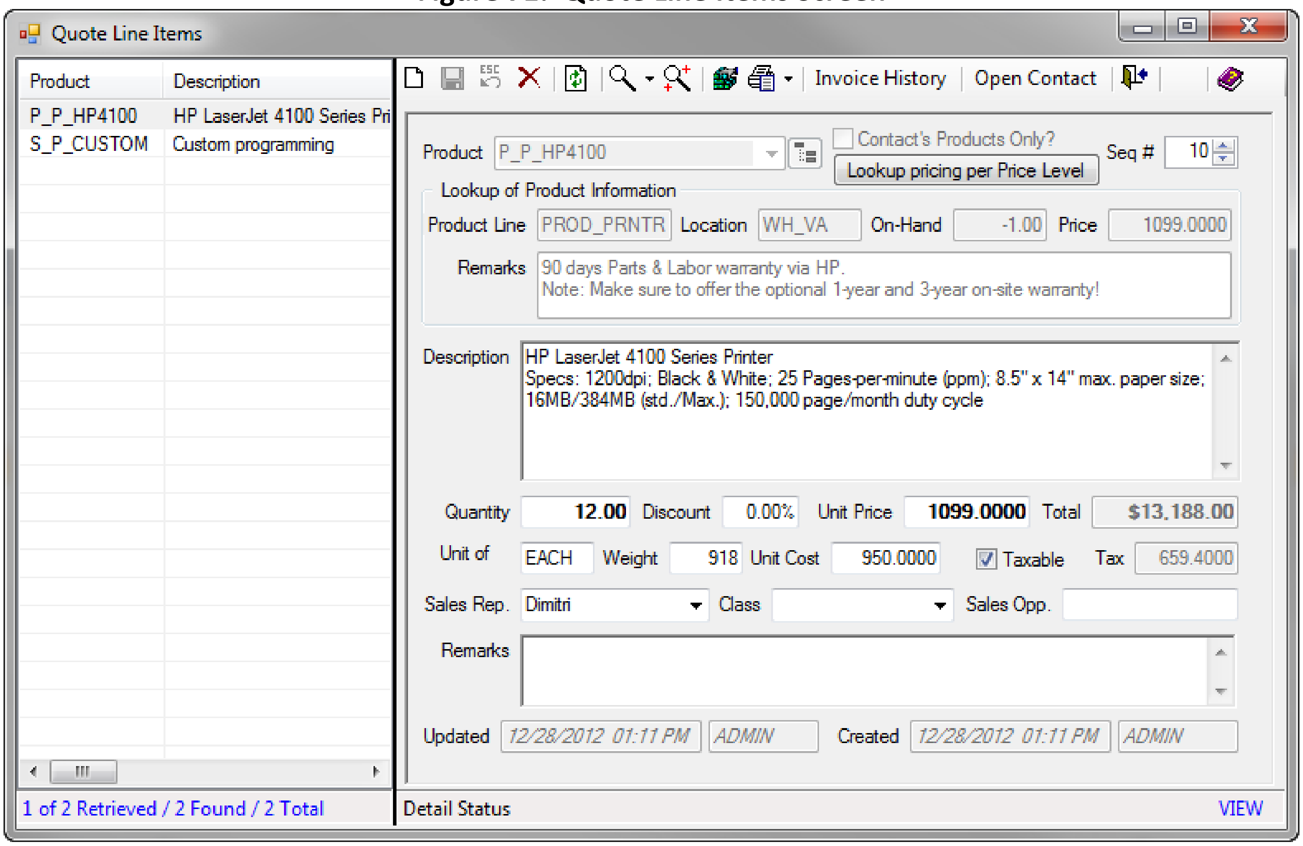
b. **Via the "Add" button**:

   i. Click the **Add** button to open the Quote Line Items screen.

   ii. Select a **Product** from the drop down and change other fields on the screen as necessary.

   iii. Click the icon to save the record. To add another line item, click the Add icon and repeat this step as necessary. Close the screen when you have added all line items.

Figure 71: Quote Line Items Screen



Note: Once a Product is selected, click the **Invoice History** button or the **Open Contact** button in the upper tool bar to view the sales history of the selected product. For more details, refer to *Viewing Product Sales History When Creating a Quote*.

7. When you are done adding line items, click the icon to save the Quote.

Viewing Product Sales History When Creating a Quote

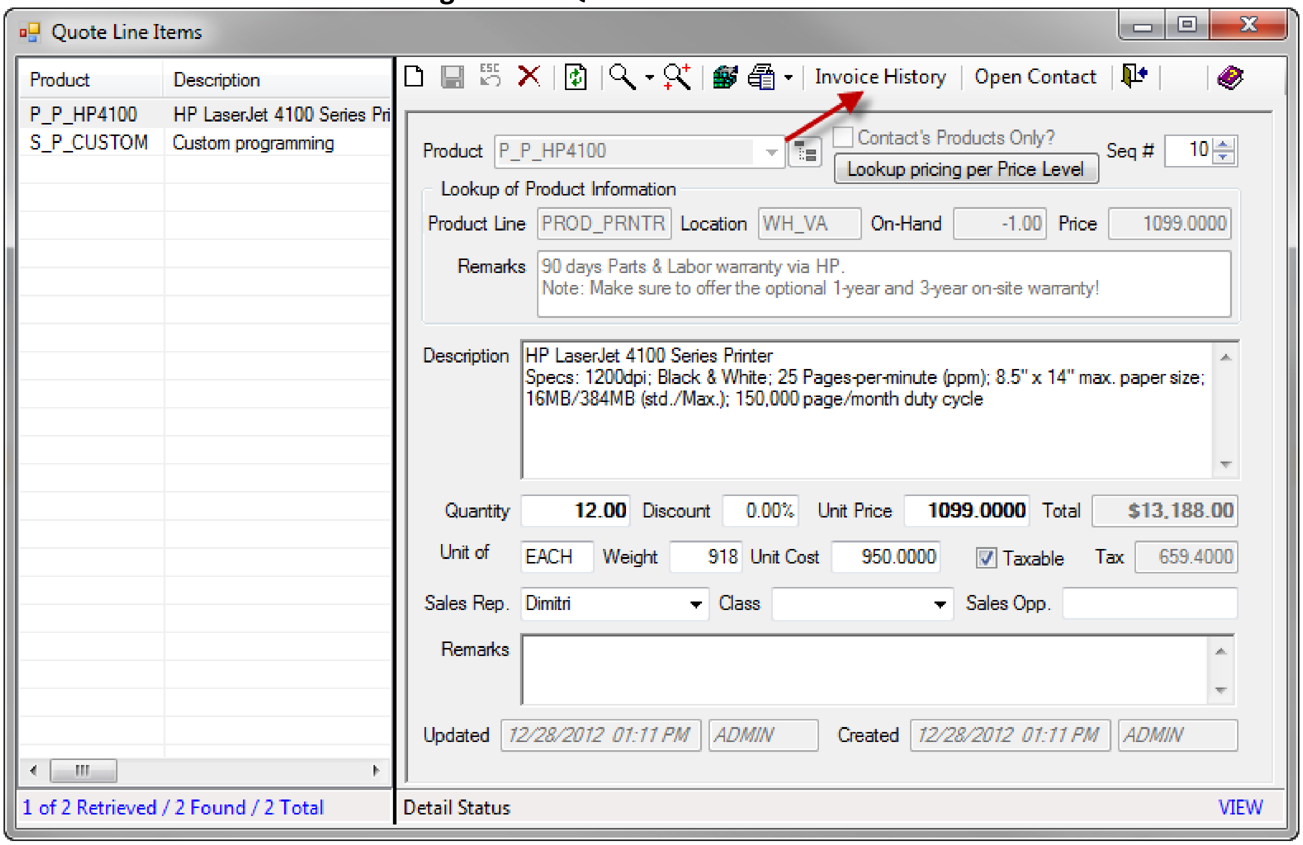
Viewing a product's sales history when creating a Quote is helpful when you need to determine previous pricing, previous customers and other historical information about the Product.

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quote you would like to open.

3. Click the Add button on the Quote Details tab. The Quote Line Items screen appears.

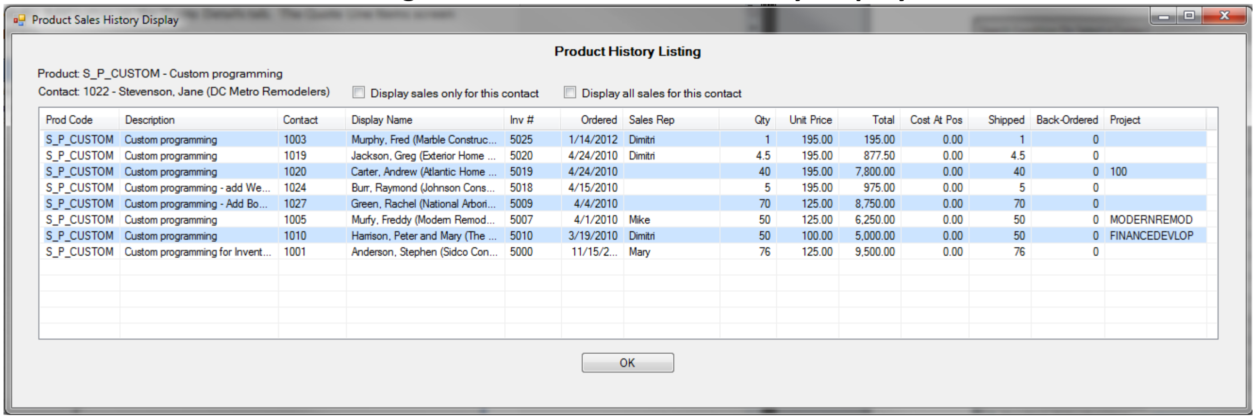
Figure 72: Quote Line Items Screen



4. Select a **Product** from the Product drop-down list.

5. Once a product is selected, click the **Invoice History** button in the upper toolbar. The Product Sales History Display screen will appear.

Figure 73: Product Sales History Display



Prod Code	Description	Contact	Display Name	Inv #	Ordered	Sales Rep	Qty	Unit Price	Total	Cost At Pos	Shipped	Back-Ordered	Project
S_P_CUSTOM	Custom programming	1003	Murphy, Fred (Marble Construc...	5025	1/14/2012	Dimitri	1	195.00	195.00	0.00	1	0	
S_P_CUSTOM	Custom programming	1019	Jackson, Greg (Exterior Home ...	5020	4/24/2010	Dimitri	4.5	195.00	877.50	0.00	4.5	0	
S_P_CUSTOM	Custom programming	1020	Carter, Andrew (Atlantic Home ...	5019	4/24/2010		40	195.00	7,800.00	0.00	40	0	100
S_P_CUSTOM	Custom programming - add We...	1024	Burr, Raymond (Johnson Cons...	5018	4/15/2010		5	195.00	975.00	0.00	5	0	
S_P_CUSTOM	Custom programming - Add Bo...	1027	Green, Rachel (National Arbori...	5009	4/4/2010		70	125.00	8,750.00	0.00	70	0	
S_P_CUSTOM	Custom programming	1005	Murfy, Freddy (Modern Remod...	5007	4/1/2010	Mike	50	125.00	6,250.00	0.00	50	0	MODERNREMOD
S_P_CUSTOM	Custom programming	1010	Harrison, Peter and Mary (The ...	5010	3/19/2010	Dimitri	50	100.00	5,000.00	0.00	50	0	FINANCEDEVLOP
S_P_CUSTOM	Custom programming for Invent...	1001	Anderson, Stephen (Sidco Con...	5000	11/15/2...	Mary	76	125.00	9,500.00	0.00	76	0	

6. By default, all sales for selected Product will be displayed in the Product History Listing. To display the selected Product sales only for the selected contact, check "**Display sales only for this contact".** To display the entire Invoice History (for all products) for the current contact, check "**Display all sales for this contact**".

7. Click **OK** to close the screen and return to the Quote Line Items screen.

Note: Alternatively, click the Open Contact button in the upper toolbar to view the Contact Record of the selected contact. Navigate to the Invoice Details (Inv. Detail) Tab or the Invoices Tab to view Sales History for that contact.

How to Update a Quote

Once a Quote is created, any edits should be made through the Update button located on the Quotes screen. This button allows you to edit the Contact field as well as update the various other fields on the line item level.

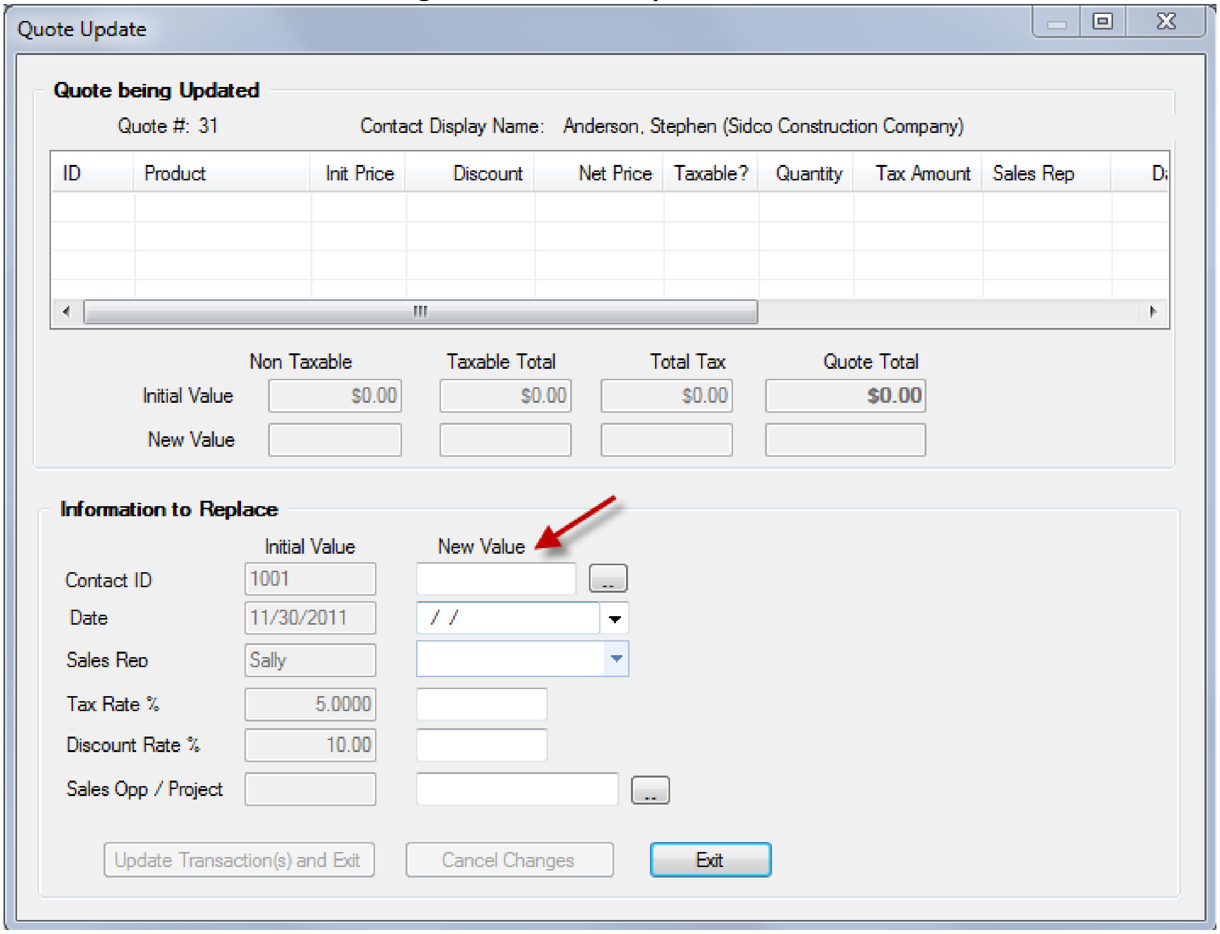
Note: Although some updates can be changed directly from the Quotes screen, these updates will not appear on the individual Product Line Items. Therefore, using the Update button is recommended so that changes are updated on the entire Quote.

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quote you would like to open.

3. Click the **Update** button located in the toolbar. The Quote Update screen appears.

Figure 74: Quote Update Screen



4. In the **New Value** column, enter the new **Contact ID**, **Date**, **Sales Rep**, **Tax Rate**, **Discount Rate** and/or **Sales Opp/Project** information as necessary.

5. Click the **Update Transaction(s) and Exit** button.

How to Open an Existing Quote

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Conduct a search. A list of quotes meeting your search criteria will appear.

3. Double-click on the Quote you would like to open.

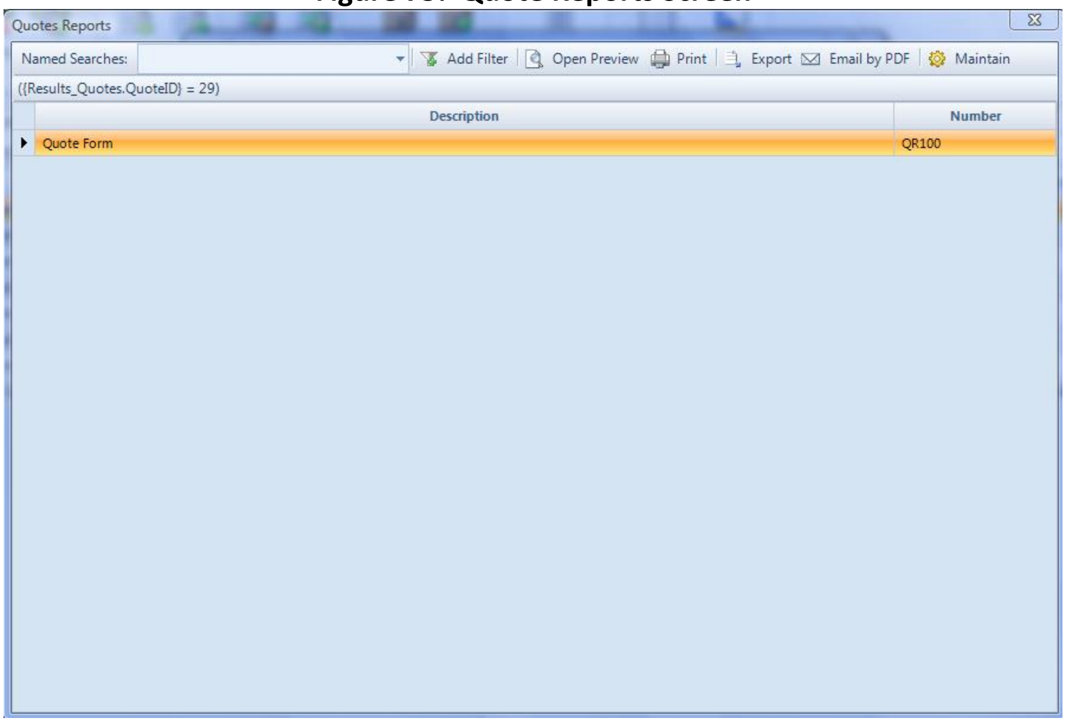
How to Print a Quote

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quote you would like to print.

3. Click the **Print or Email** button that appears on the upper toolbar of the **Quote** screen. The following screen appears:

Figure 75: Quote Reports Screen



4. Highlight the preferred layout for your quote.

5. Click the **Print** button at the top of the screen.

Figure 76: Quote Report

Quote

Bill To	Ship To
Mike Cunningham General Manager Virginia Windows & Roofing 4222 James Madison Court Fairfax, VA 20153 USA	Mike Cunningham General Manager Virginia Windows & Roofing 4222 James Madison Court Fairfax, VA 20153 USA

Account #	Quote #	Quote Date	Valid Thru	Terms	Rep.	Ship Via	FOB
1018	29	07/07/2010	08/06/2010	NET30	Dimitri		

Product	Description	Quantity	Unit Price	Total Price
P_P_HP4100	HP LaserJet 4100 Series Printer Specs: 1200dpi; Black & White; 25 Pages-per-minute (ppm); 8.5" x 14" max. paper size; 16MB/384MB (std./Max.); 150,000 page/month duty cycle	7.00	$1,099.00	$7,693.00
CRM	CRM Software	1.00	$325.00	$325.00

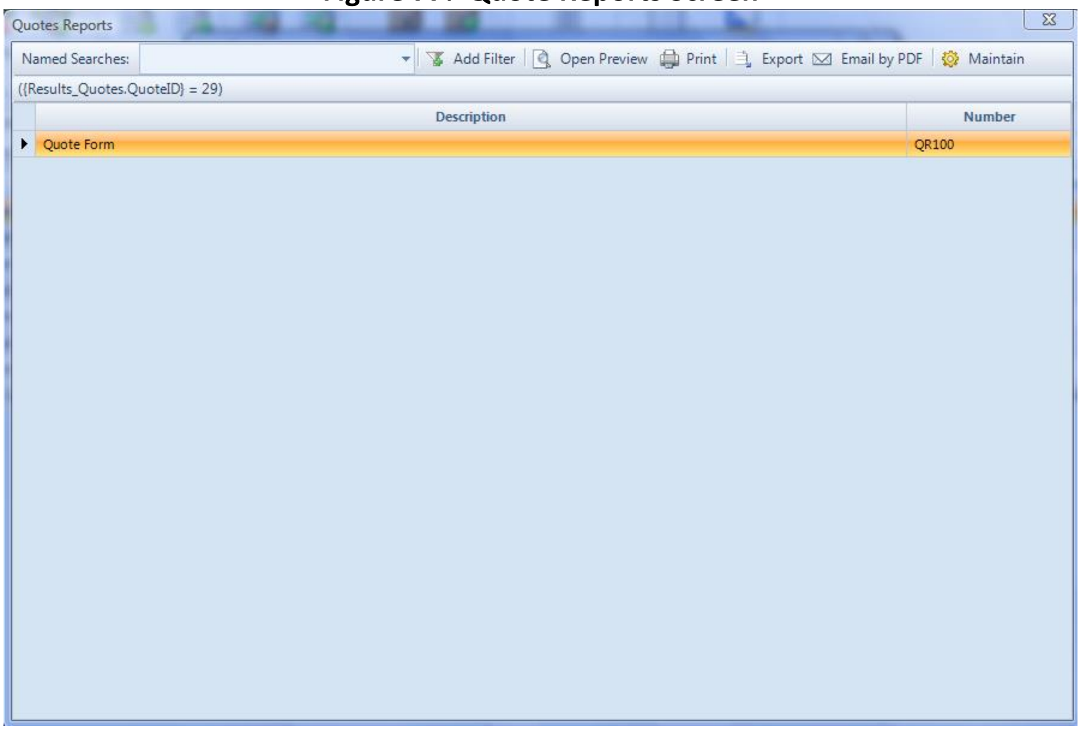
How to Email a Quote

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quote you would like to email.

3. Click the **Print or Email** button that appears on the upper toolbar of the **Quote** screen. The following screen appears:

Figure 77: Quote Reports Screen



4. Highlight the preferred layout for your Quote.

5. Click the **Email by PDF** button in the toolbar. An email will open with an attached PDF file of the quote. The email will be addressed to the Primary Contact, the Bill To Associate (if different), and the Ship To Associate (if different). **Note:** Refer to How to Change Configuration and Set up Options, to customize the contents of the email message.

How to Convert a Quote into Tasks

Quote Details that are identified as a Service can be converted into Activity records. In order to use this feature, Activity Types need to be Identical to the Product/Item name. To create or edit Activity Types, refer to the Lookup Tables section of this User Manual.

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quotes you would like to open.

3. Click the **Tasks** button that appears on the top right portion of the screen in the “Convert Quote to” section.

4. A confirmation question will appear. Click “Yes” to continue with the quote conversion.

5. The confirmation message will appear with the number of Activity Records that have been created.

How to Convert a Quote into a Sales Order

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

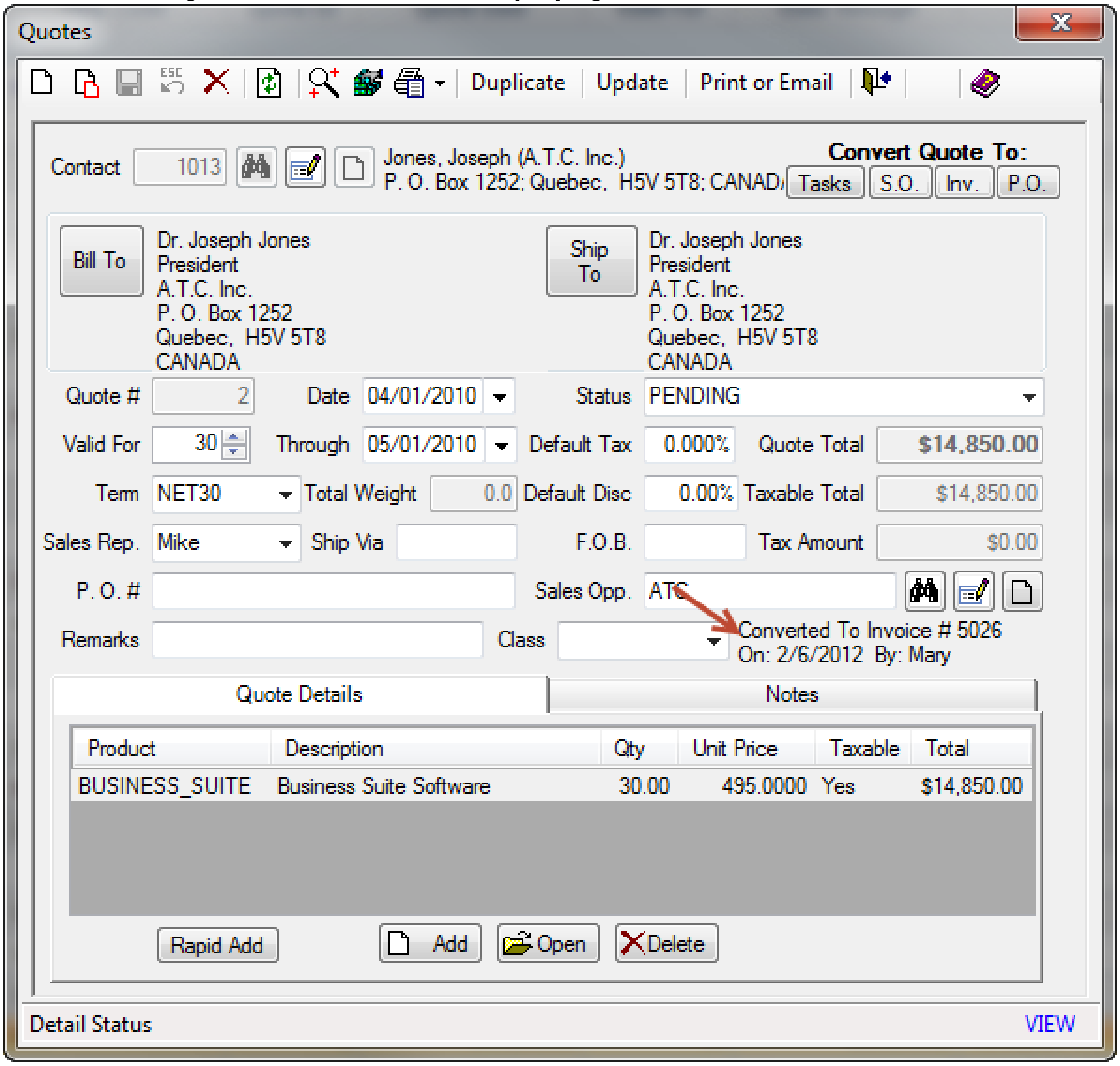
2. Double-click on the Quotes you would like to open.

3. Click the **S.O.** button that appears on the top right portion of the screen in the “Convert Quote to” section.

4. A confirmation question will appear. Click “Yes” to continue with the quote conversion.

5. The confirmation message will appear with the Sales Order number. Comments indicating the Sales Order number and date of transfer will be displayed to the right of the **Remarks** and **Class** fields on the Quotes screen.

Figure 78: Quote Screen Displaying Sales Order Conversion Info



How to Convert a Quote into an Invoice

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

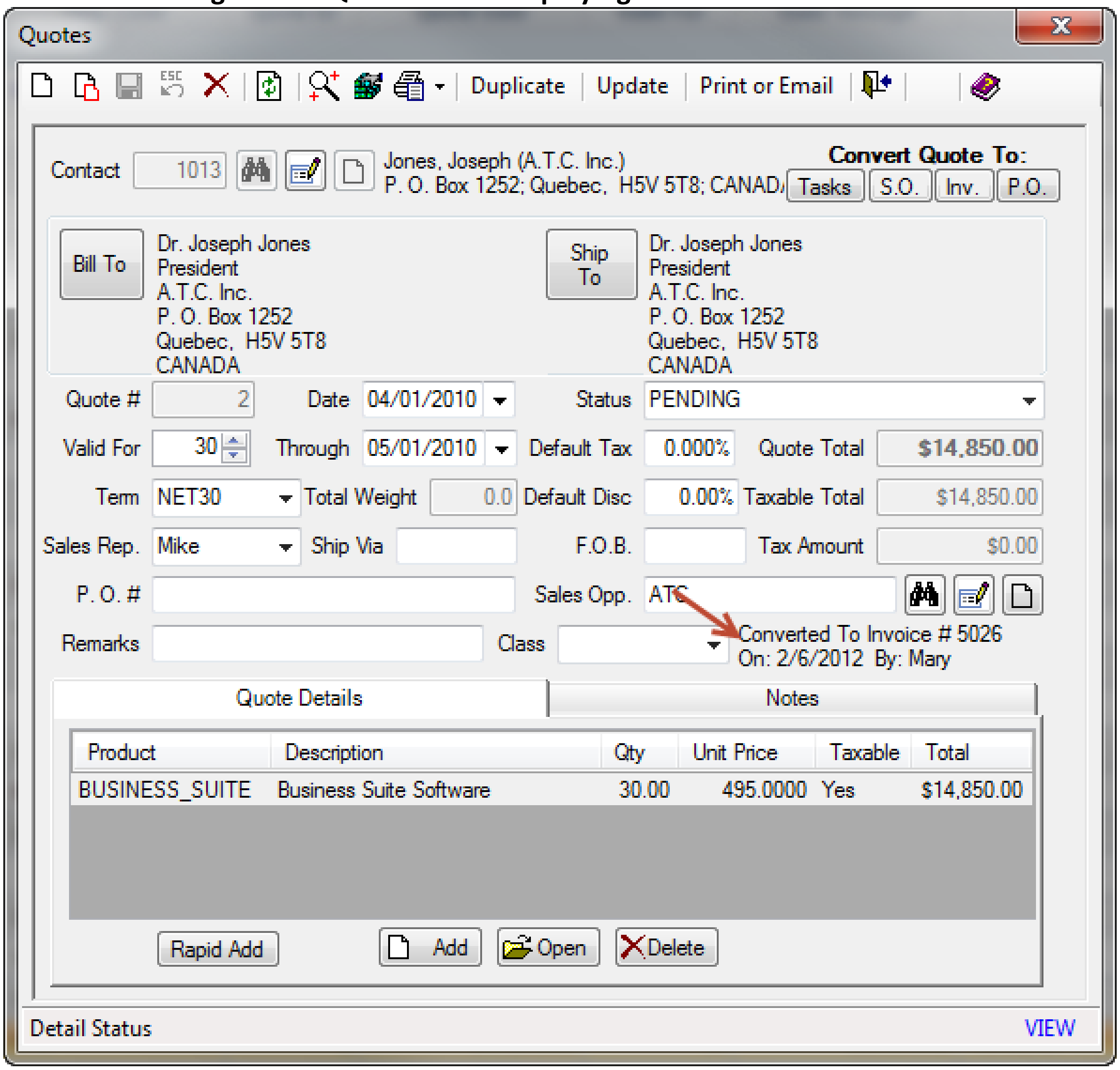
2. Double-click on the Quotes you would like to open.

3. Click the **Inv.** (Invoice) button that appears on the top portion of the screen in the "Convert Quote to" section.

4. A confirmation question will appear. Click "Yes" to continue with the quote conversion.

5. The confirmation message will appear with the Invoice number. Comments indicating the invoice number and date of transfer will be displayed to the right of the **Remarks** and **Class** fields on the Quotes screen.

Figure 79: Quote Screen Displaying Invoice Conversion Info



How to Convert a Quote into a Purchase Order

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

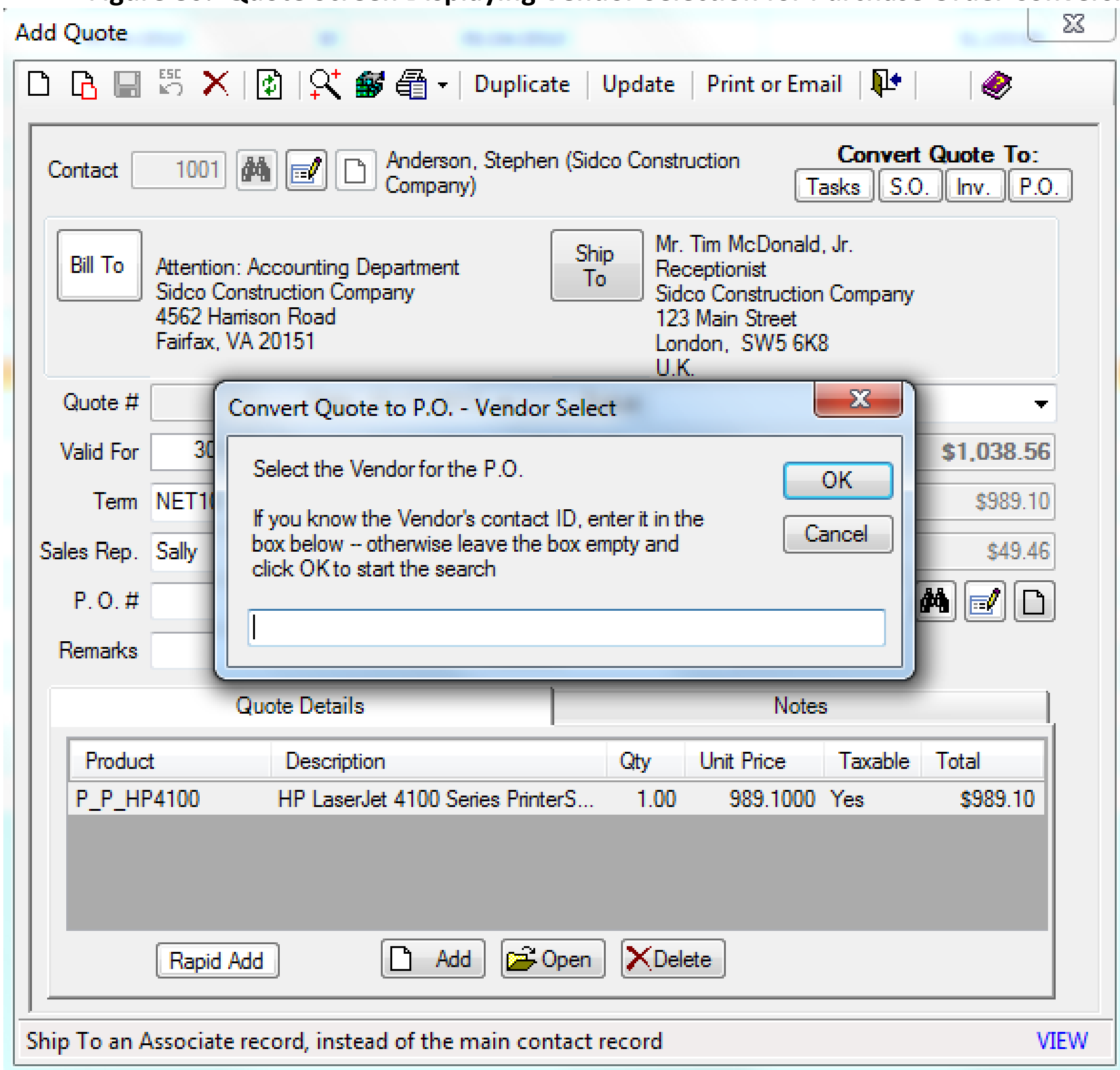
2. Double-click on the Quotes you would like to open.

3. Click the **P.O.** button that appears on the top portion of the screen in the “Convert Quote to” section.

4. A confirmation question will appear. Click “Yes” to continue with the quote conversion.

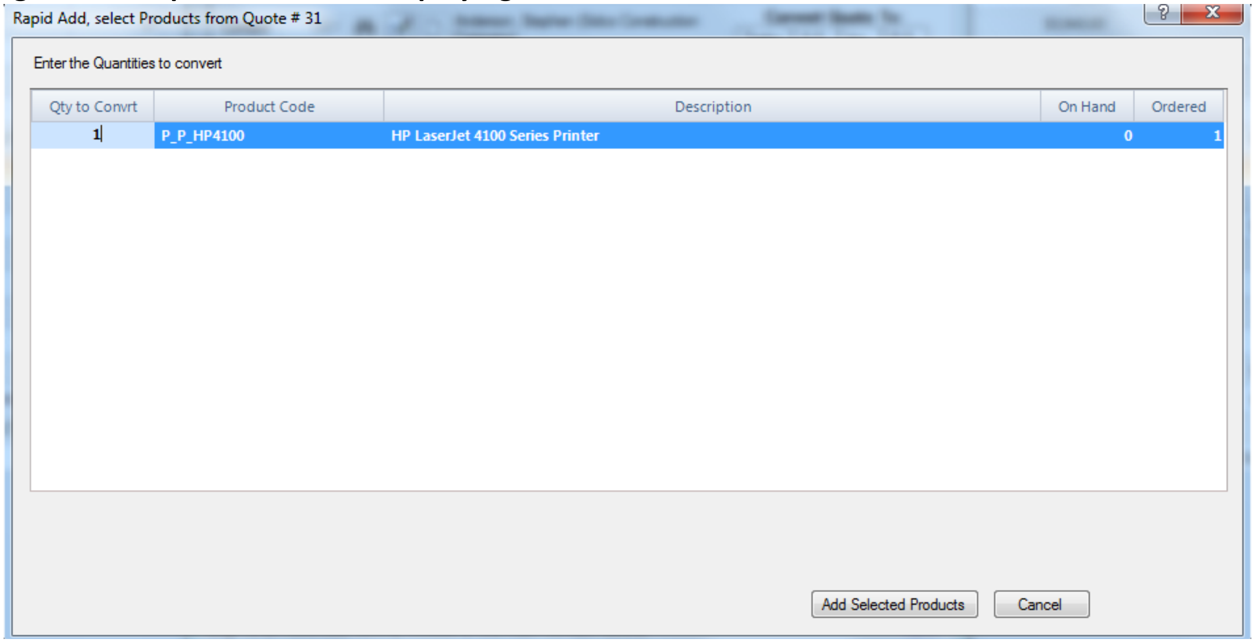
5. You will be prompted to enter the Vendor’s Results Contact ID. If you do not know the Contact ID, leave the Vendor Select box blank and click **OK** prompt the search screen.

Figure 80: Quote Screen Displaying Vendor Selection for Purchase Order Conversion



6. After entering or selecting a Vendor Contact ID, the Rapid Add screen will appear, displaying the Products that were entered on the Quote form. If necessary, change the quantities for each Product.

Figure 81: Rapid Add Screen Displaying Products from Quote for Purchase Order Conversion



7. Click **Add Selected Products** button.

8. A confirmation message will appear with the new Purchase Order number.
   Note: To open the Purchase Order, navigate to the Purchase Order DMC.

How to Copy or Duplicate an Existing Quote

1. On the **Sales & Marketing** tab, in the **Quotes** group, click **Manage**. The **Quote Data Management Center** will appear.

2. Double-click on the Quote you would like to open.

3. Click the **Duplicate** button that appears on the upper toolbar of the **Quote** screen.

4. Click the "YES" button to confirm that you would like to duplicate the Quote.

5. A message will display the Quote Number of the newly created record. To open the new Quote, use the Quotes DMC to search for the new Quote number.

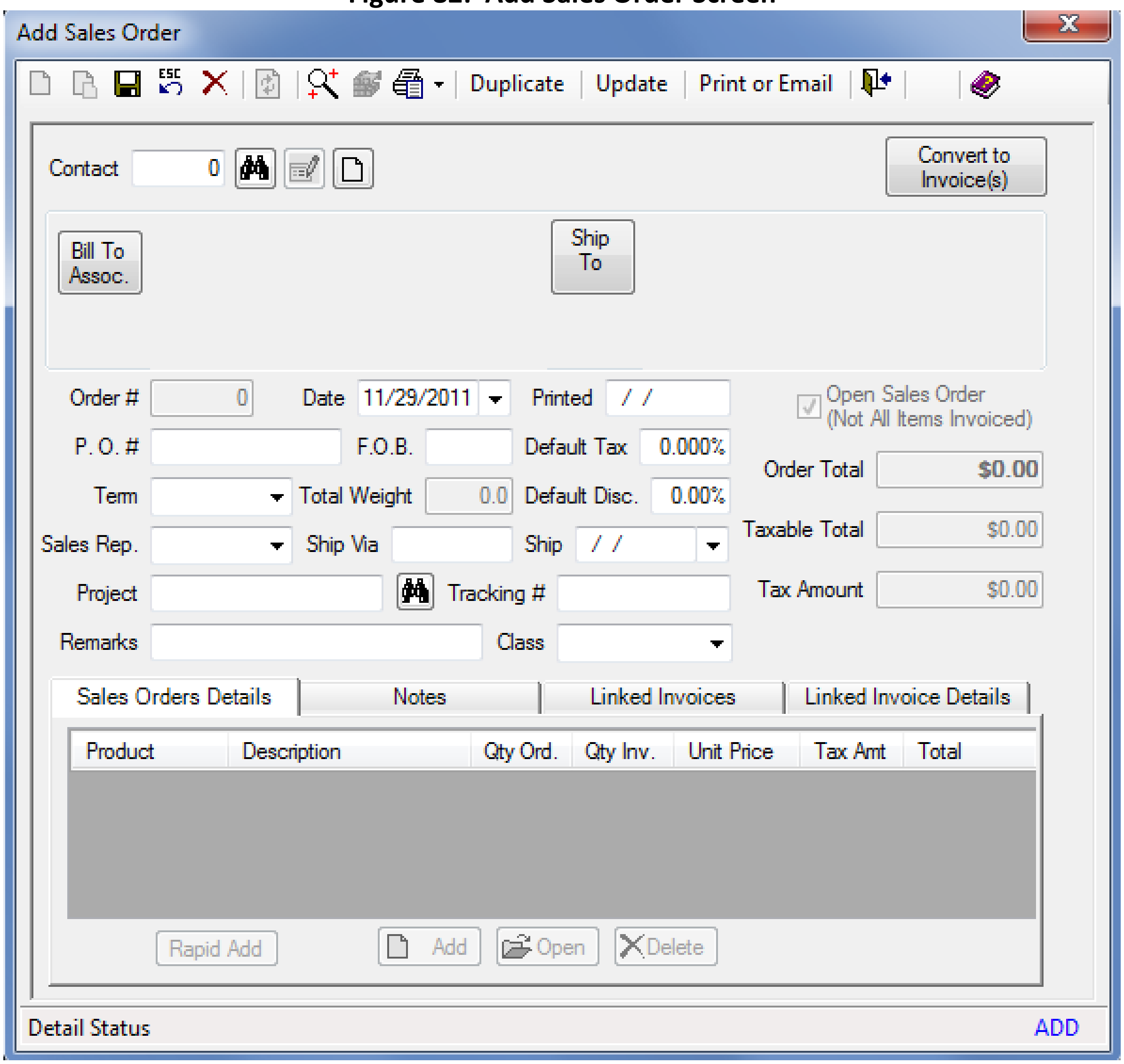
Sales Orders

The sales order module offers the ability to create and edit sales orders. Sales Orders can be converted into full or partial Invoices.

How to Create a Sales Order

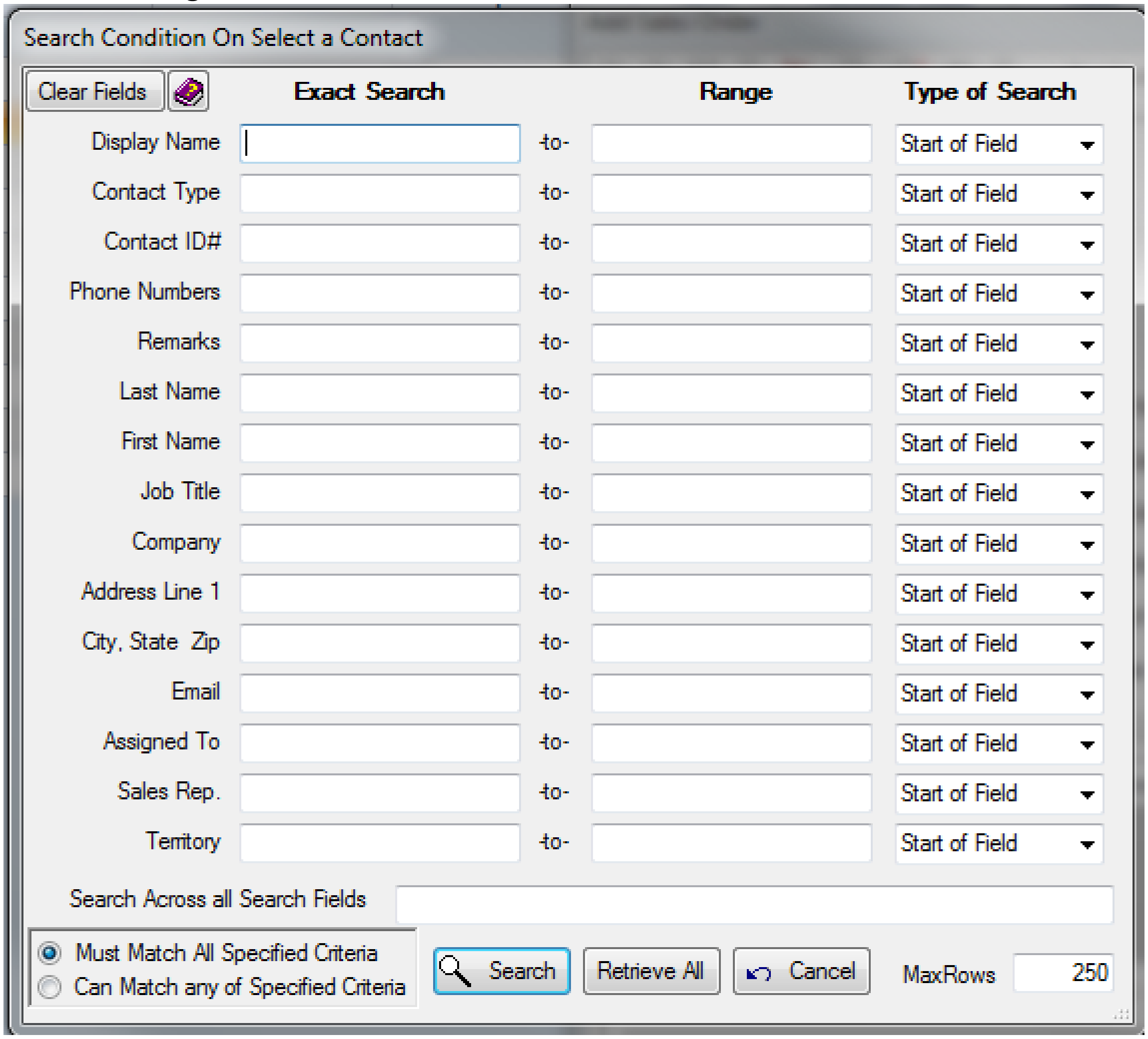
1. On the **Sales & Marketing** tab, in the **Sales Order** group, click **Add**. The **Add Sales Order** screen will appear.

Figure 82: Add Sales Order Screen



2. Enter a **Contact ID** or to search for a contact, click the binocular icon. The following screen will appear:

Figure 83: Search Condition on Select a Contact Screen



Type in relevant contact information for the contact you would like to link to this project. Click **Search**. A list of contacts meeting the Search criteria will display. Double-click on the Contact you would like to link to the Project.

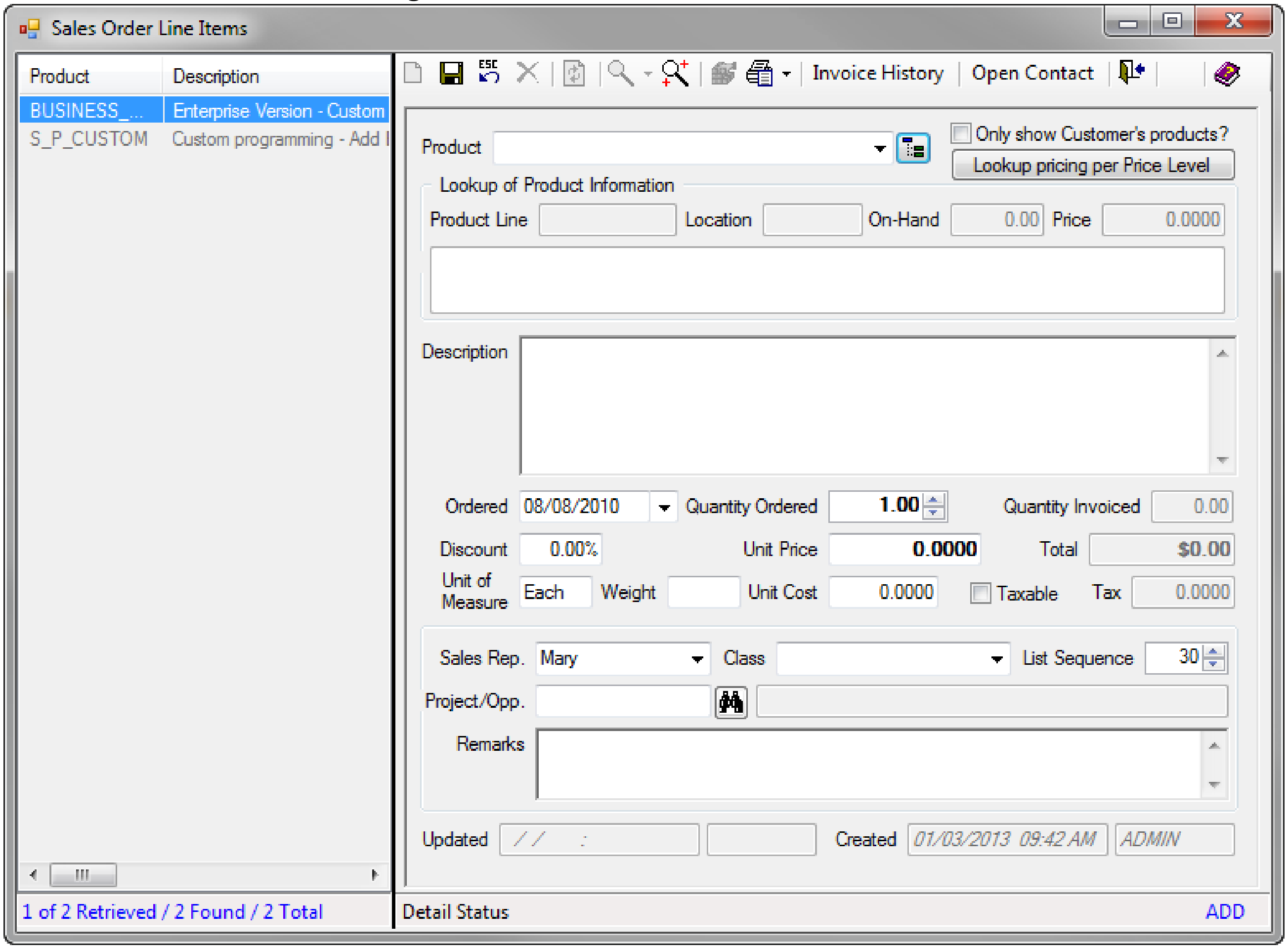
3. The selected or added Contact will automatically populate the **Bill To** and **Ship To** addresses. To change either of these, click the respective buttons. A list of Associate records for the selected Contact will appear. Double-click the desired address.

4. Fill in appropriate information on the top portion of the Sales Order screen.

5. Click the **Save** icon to save the record. The buttons in the Sales Orders Details part of the screen will now become available.

6. Click the **Add** button to open the Sales Order Line Items screen. Select a **Product** from the drop down and change other fields on the screen as necessary. Click the **Save** icon to save the record. To add another line item, click the Add icon and repeat this step as necessary. Close the screen when you have added all line items.

Figure 84: Sales Order Line Item Screen



Note: Once a Product is selected, click the **Invoice History** button or the **Open Contact** button in the upper tool bar to view the sales history of the selected product. For more details, refer to Viewing Product Sales History When Creating a Sales Order.

7. When you are done adding line items, click the **Save** icon to save the Sales Order.

Viewing Product Sales History When Creating a Sales Order

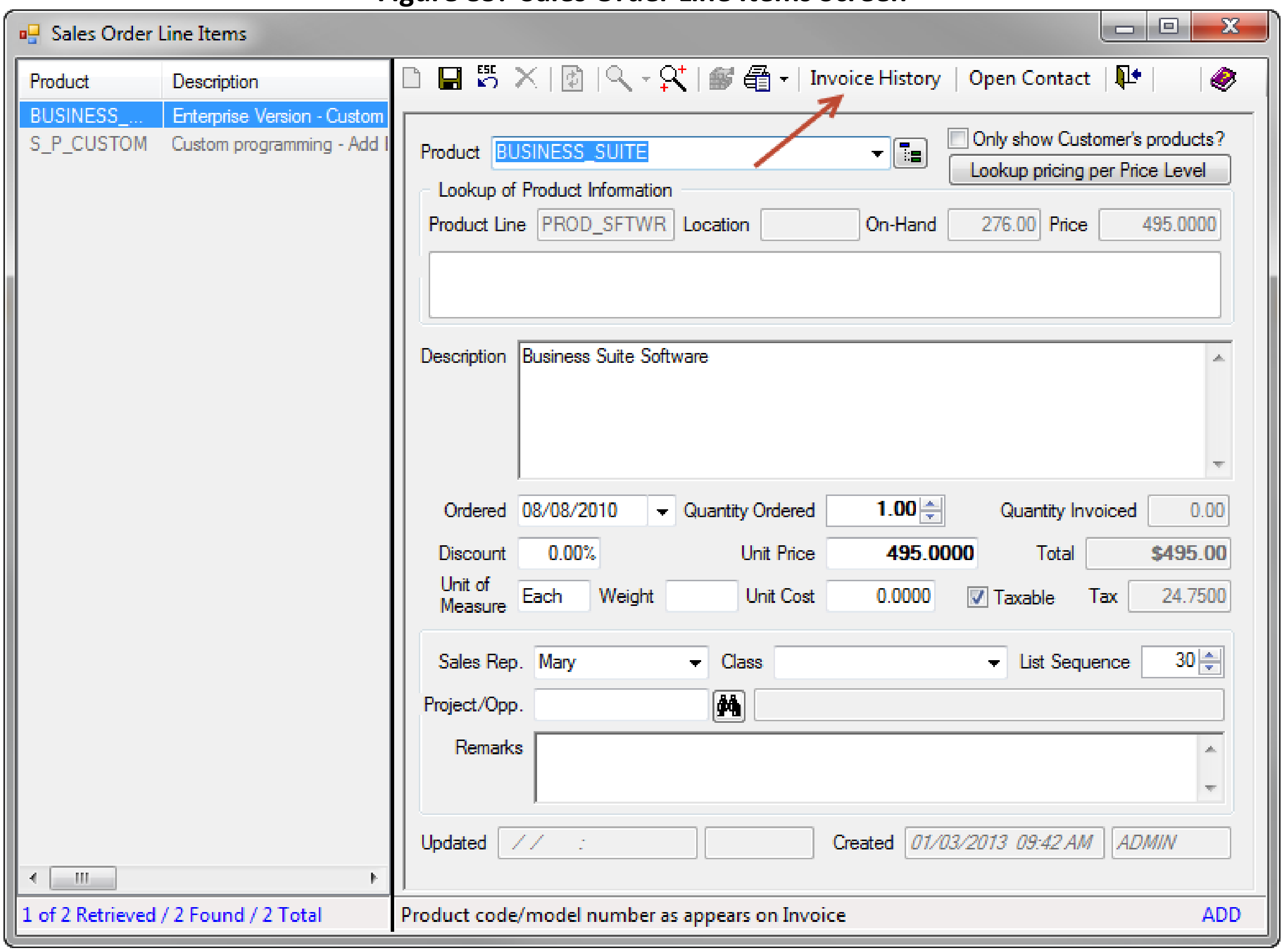
Viewing a product's sales history when creating a Sales Order is helpful when you need to determine previous pricing, previous customers and other historical information about the Product.

1. On the **Sales & Marketing** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Add** button on the Sales Order Details tab. The Sales Order Line Items screen appears.

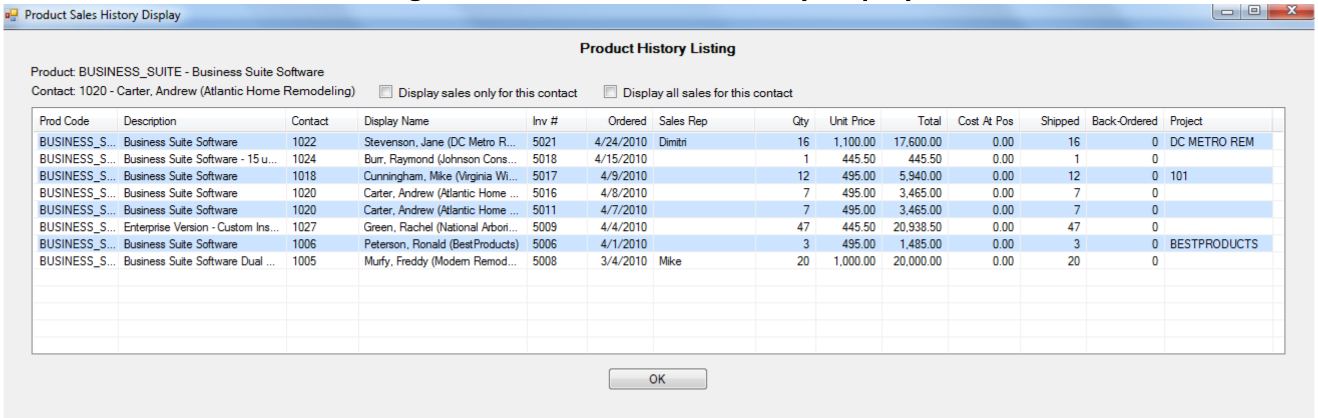
Figure 85: Sales Order Line Items Screen



4. Select a **Product** from the Product drop-down list.

5. Once a product is selected, click the **Invoice History** button in the upper toolbar. The Product Sales History Display screen will appear.

Figure 86: Product Sales History Display



Prod Code	Description	Contact	Display Name	Inv #	Ordered	Sales Rep	Qty	Unit Price	Total	Cost At Pos	Shipped	Back-Ordered	Project
BUSINESS_S...	Business Suite Software	1022	Stevenson, Jane (DC Metro R...	5021	4/24/2010	Dimitri	16	1,100.00	17,600.00	0.00	16	0	DC METRO REM
BUSINESS_S...	Business Suite Software - 15 u...	1024	Burr, Raymond (Johnson Cons...	5018	4/15/2010		1	445.50	445.50	0.00	1	0	
BUSINESS_S...	Business Suite Software	1018	Cunningham, Mike (Virginia Wi...	5017	4/9/2010		12	495.00	5,940.00	0.00	12	0	101
BUSINESS_S...	Business Suite Software	1020	Carter, Andrew (Atlantic Home ...	5016	4/8/2010		7	495.00	3,465.00	0.00	7	0	
BUSINESS_S...	Business Suite Software	1020	Carter, Andrew (Atlantic Home ...	5011	4/7/2010		7	495.00	3,465.00	0.00	7	0	
BUSINESS_S...	Enterprise Version - Custom Ins...	1027	Green, Rachel (National Arbori...	5009	4/4/2010		47	445.50	20,938.50	0.00	47	0	
BUSINESS_S...	Business Suite Software	1006	Peterson, Ronald (BestProducts)	5006	4/1/2010		3	495.00	1,485.00	0.00	3	0	BESTPRODUCTS
BUSINESS_S...	Business Suite Software Dual ...	1005	Murfy, Freddy (Modern Remod...	5008	3/4/2010	Mike	20	1,000.00	20,000.00	0.00	20	0	

6. By default, all sales for selected Product will be displayed in the Product History Listing. To display the selected Product sales only for the selected contact, check "**Display sales only for this contact".** To display the entire Invoice History (for all products) for the current contact, check "**Display all sales for this contact**".

7. Click **OK** to close the screen and return to the Sales Order Line Items screen.

Note: Alternatively, click the **Open Contact** button in the upper toolbar to view the Contact Record of the selected contact. Navigate to the Invoice Details Tab or the Invoices Tab to view Sales History for that contact.

How to Update a Sales Order

Once a Sales Order is created, any edits should be made through the Update button located on the Sales Order screen. This button allows you to edit the Contact field as well as update the various other fields on the line item level.

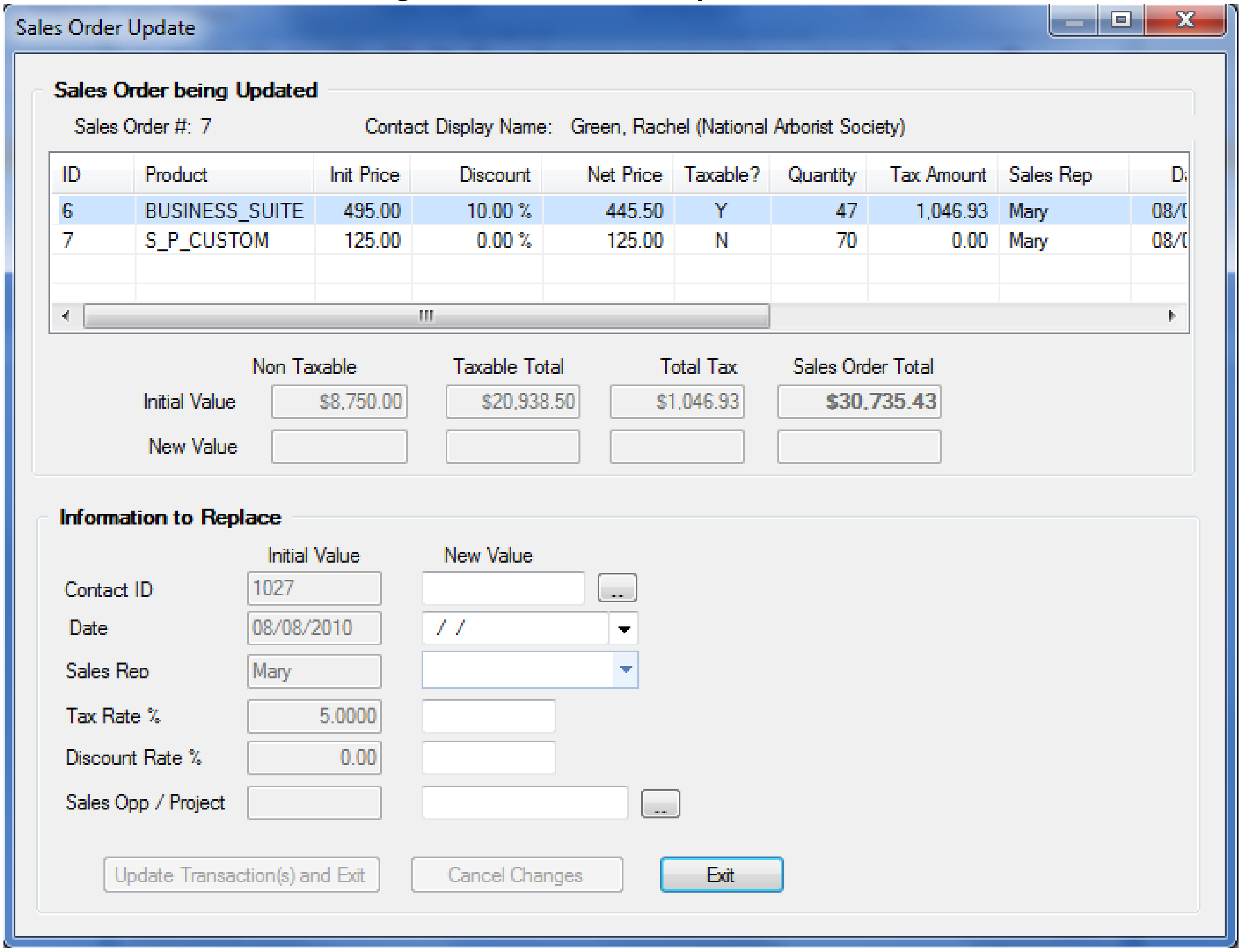
Note: Although some updates can be changed directly from the Sales Order screen, these updates will not appear on the individual Product Line Items. Therefore, using the Update button is recommended so that changes are updated on the entire Sales Order.

1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Update** button located in the toolbar. The Sales Order Update screen appears.

Figure 87: Sales Order Update Screen



4. In the **New Value** column, enter the new **Contact ID**, **Date**, **Sales Rep**, **Tax Rate**, **Discount Rate** and/or **Sales Opp/Project** information as necessary.

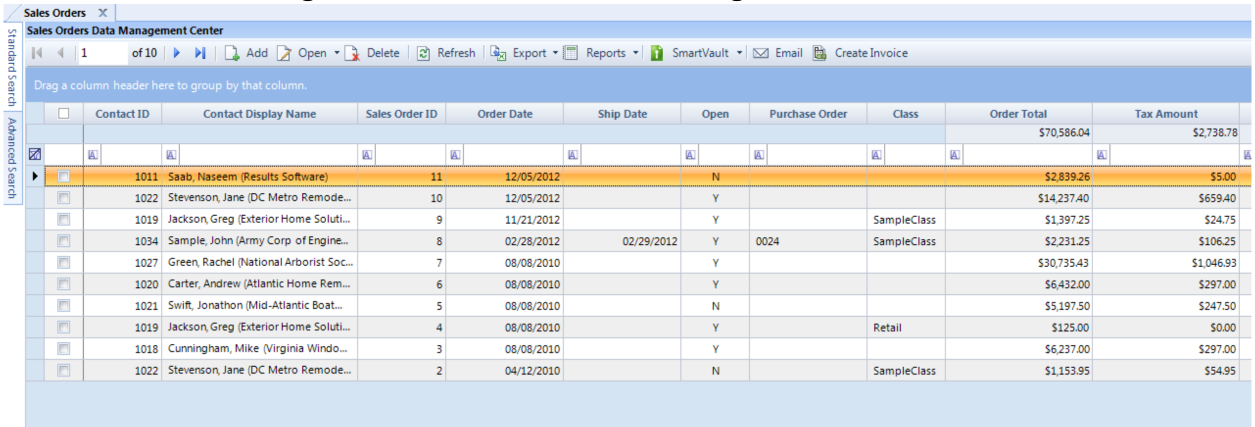
5. Click the **Update Transaction(s) and Exit** button.

How to Open an Existing Sales Order

1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Conduct a Search. Double-click on the Sales Order you would like to open.

Figure 88: Sales Order Data Management Center Screen



Contact ID	Contact Display Name	Sales Order ID	Order Date	Ship Date	Open	Purchase Order	Class	Order Total	Tax Amount
								$70,586.04	$2,738.78
1011	Saab, Naseem (Results Software)	11	12/05/2012		N			$2,839.26	$5.00
1022	Stevenson, Jane (DC Metro Remode...	10	12/05/2012		Y			$14,237.40	$659.40
1019	Jackson, Greg (Exterior Home Soluti...	9	11/21/2012		Y		SampleClass	$1,397.25	$24.75
1034	Sample, John (Army Corp of Engine...	8	02/28/2012	02/29/2012	Y	0024	SampleClass	$2,231.25	$106.25
1027	Green, Rachel (National Arborist Soc...	7	08/08/2010		Y			$30,735.43	$1,046.93
1020	Carter, Andrew (Atlantic Home Rem...	6	08/08/2010		Y			$6,432.00	$297.00
1021	Swift, Jonathon (Mid-Atlantic Boat...	5	08/08/2010		N			$5,197.50	$247.50
1019	Jackson, Greg (Exterior Home Soluti...	4	08/08/2010		Y		Retail	$125.00	$0.00
1018	Cunningham, Mike (Virginia Windo...	3	08/08/2010		Y			$6,237.00	$297.00
1022	Stevenson, Jane (DC Metro Remode...	2	04/12/2010		N		SampleClass	$1,153.95	$54.95

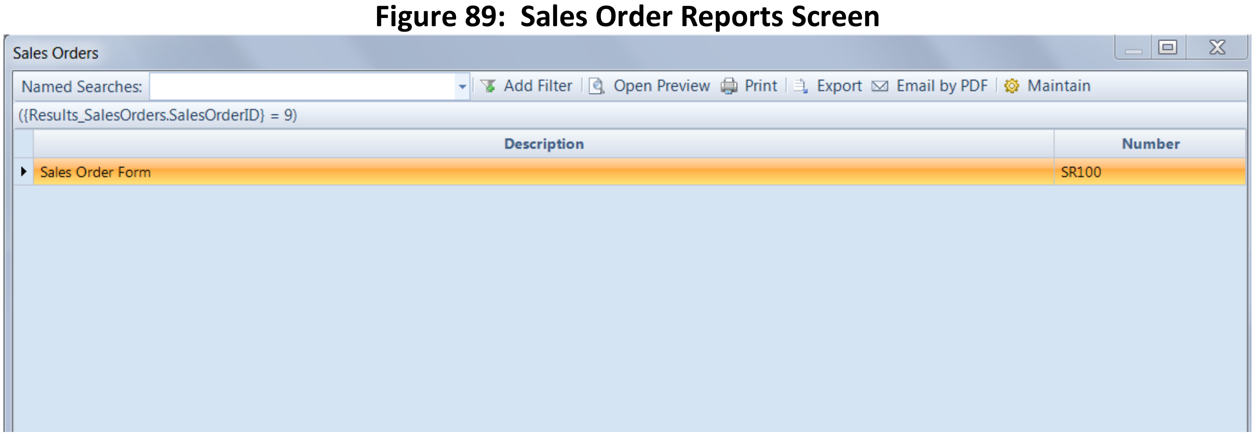
How to Print a Sales Order

1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Print or Email** button that appears on the upper toolbar. The following screen appears:

Figure 89: Sales Order Reports Screen



4. Highlight the preferred layout for your quote.

5. Click the **Print** button at the top of the screen.

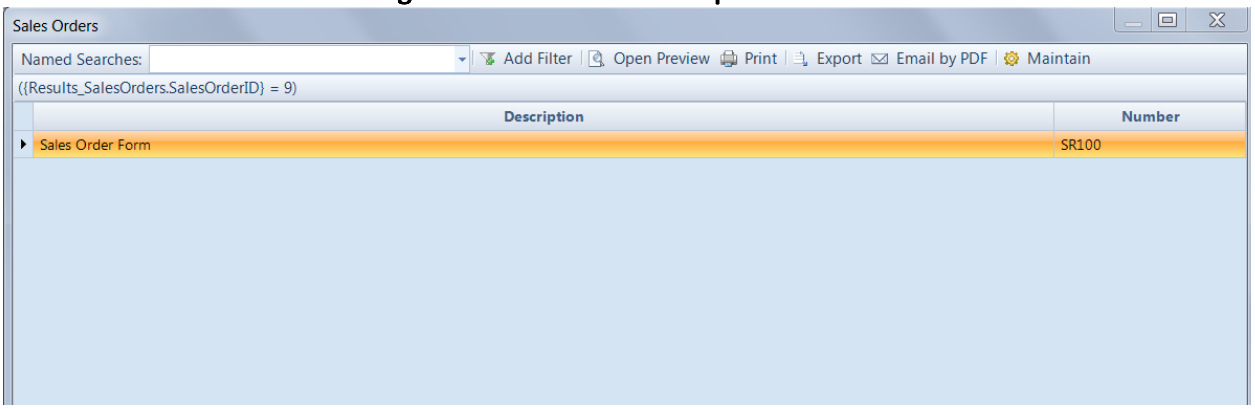
How to Email a Sales Order

1. On the **Sales & Marketing** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Print or Email** button that appears on the upper toolbar of the **Quote** screen. The following screen appears:

Figure 90: Sales Order Reports Screen



4. Highlight the preferred layout for your Sales Order.

5. Click the **Email by PDF** button in the toolbar. An email will open with an attached PDF file of the Sales Order. The email will be addressed to the Primary Contact, the Bill To Associate (if different), and the Ship To Associate (if different). **Note:** Refer to *How to Change Configuration and Set up Options,* to customize the contents of the email message.

Figure 91: Printed Sales Order

Results Software
620 Herndon Parkway; Suite 350
Herndon, Virginia 20170
703.430.9110 703.713.6050 Fax
703.430.9110
703.713.6050 Fax

Sales Order

Bill To	Ship To
George Jackson Sales Consultant SoftwareUSA 6200 Herndon Skyway Suite 9999 Herndon, VA 20170 USA	George Jackson Sales Consultant SoftwareUSA 6200 Herndon Skyway Suite 9999 Herndon, VA 20170 USA

Account #	Sales Order #	Order Date	Terms	Rep.	Ship Via	Purchase Order Number
1030	5	05/11/2009	NET30	Kathy		

Product	Description	Q. Ordered	Q. Invoiced	Unit Price	Total Price
P_P_HP4100DTN	HP LaserJet 4100 Series Printer -- Network Ready w/ 10/100 & Extra Tray & Duplexing Specs: 1200dpi; Black & White; 25 Pages-per-minute (ppm); 8.5" x 14" max. paper size; 32MB/384MB (std./Max.); 150,000 page/month duty cycle;	1.00	1.00	2,049.00	2,049.00
P_P_HP4100DTN	HP LaserJet 4100 Series Printer -- Network Ready w/ 10/100 & Extra Tray & Duplexing Specs: 1200dpi; Black & White; 25 Pages-per-minute (ppm); 8.5" x 14" max. paper size; 32MB/384MB (std./Max.); 150,000 page/month duty cycle;	3.00	3.00	2,949.00	8,847.00
P_P_HP4100DTN	HP LaserJet 4100 Series Printer -- Network Ready w/ 10/100 & Extra Tray & Duplexing	2.00	2.00	2,089.00	4,178.00

How to Convert a Sales Order to a Full Invoice

Option 1: From the Sales Order Screen

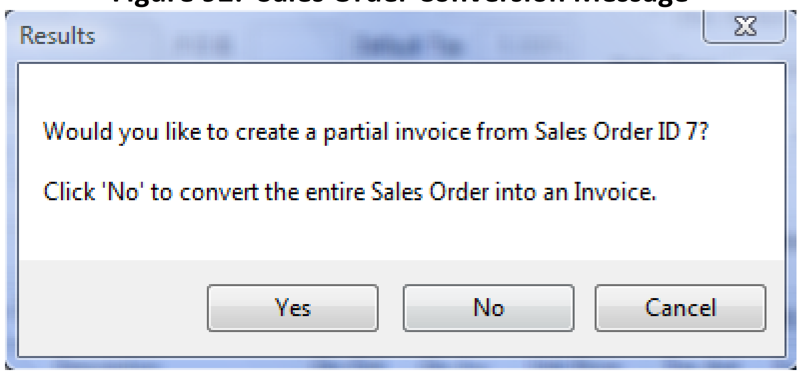
1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

1. Double-click on the Sales Order you would like to open.

2. Click the **Convert to Invoice(s)** button that appears on the top right of the screen.

3. A confirmation question will appear. Click “No” to convert the entire Sales Order into an Invoice.

Figure 92: Sales Order Conversion Message



4. A confirmation message will appear with the Invoice number.

Option 2: From the Sales Order DMC

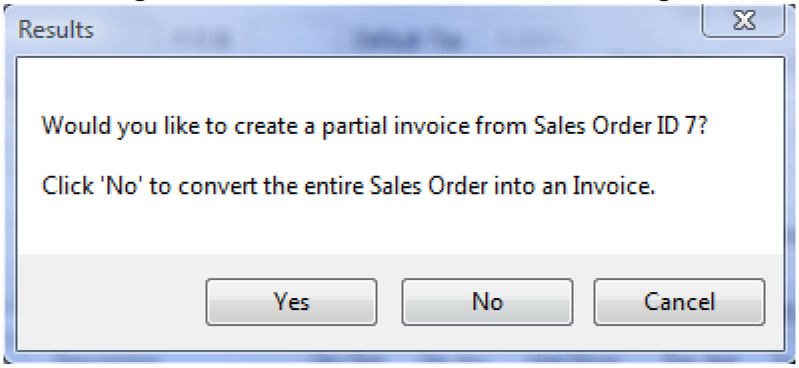
1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Highlight the Sales Order you would like to convert to an Invoice.

3. Click the **Create Invoice** button that appears at the top of the DMC.

4. A confirmation question will appear. Click “No” to convert the entire Sales Order into an Invoice.

Figure 93: Sales Order Conversion Message



5. A confirmation message will appear with the Invoice number.

How to Convert a Sales Order to a Partial Invoice

Option 1: From the Sales Order Screen

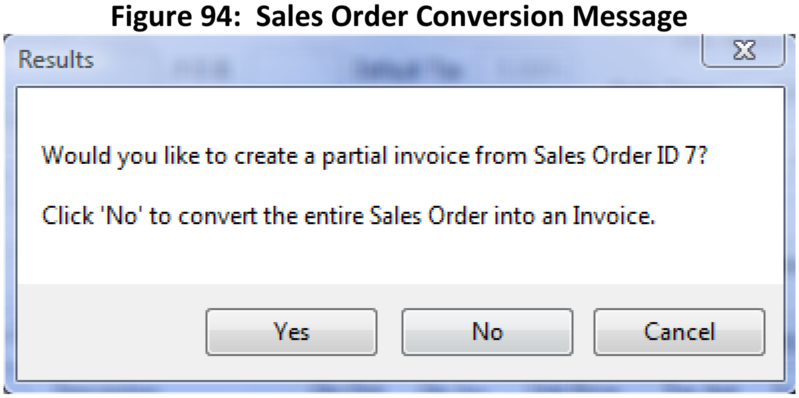
1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Convert to Invoice(s)** button that appears on the top of the screen.

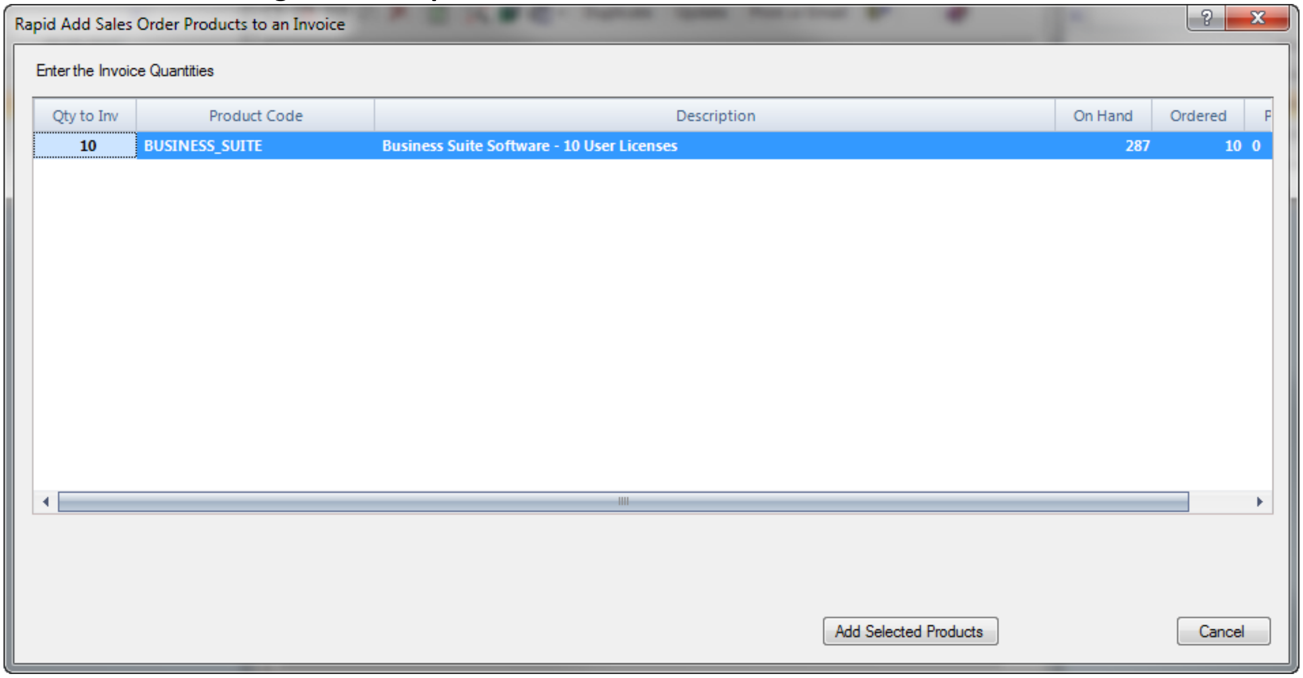
4. A confirmation question will appear. Click “Yes” to create a partial Invoice from the Sales Order.

Figure 94: Sales Order Conversion Message



5. The **Rapid Add Sales Order Products to an Invoice** screen will appear. Enter the desired Invoice quantity in the first column. **Note:** The system will quickly find the desired product when you start typing the first letters of the product name.

Figure 95: Rapid Add Sales Order Products to Invoice Screen



6. Click the **Add Selected Products** button.

7. The confirmation message will appear with the Invoice number.

Option 2: From the Sales Order DMC

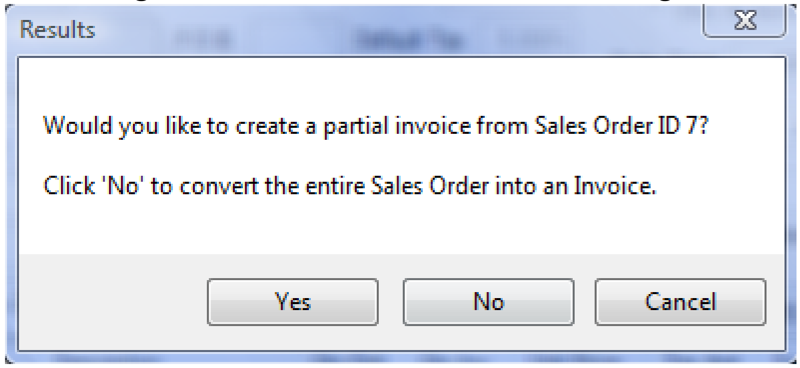
1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Highlight the Sales Order you would like to convert to an Invoice.

3. Click the **Create Invoice** button that appears on the top of the DMC.

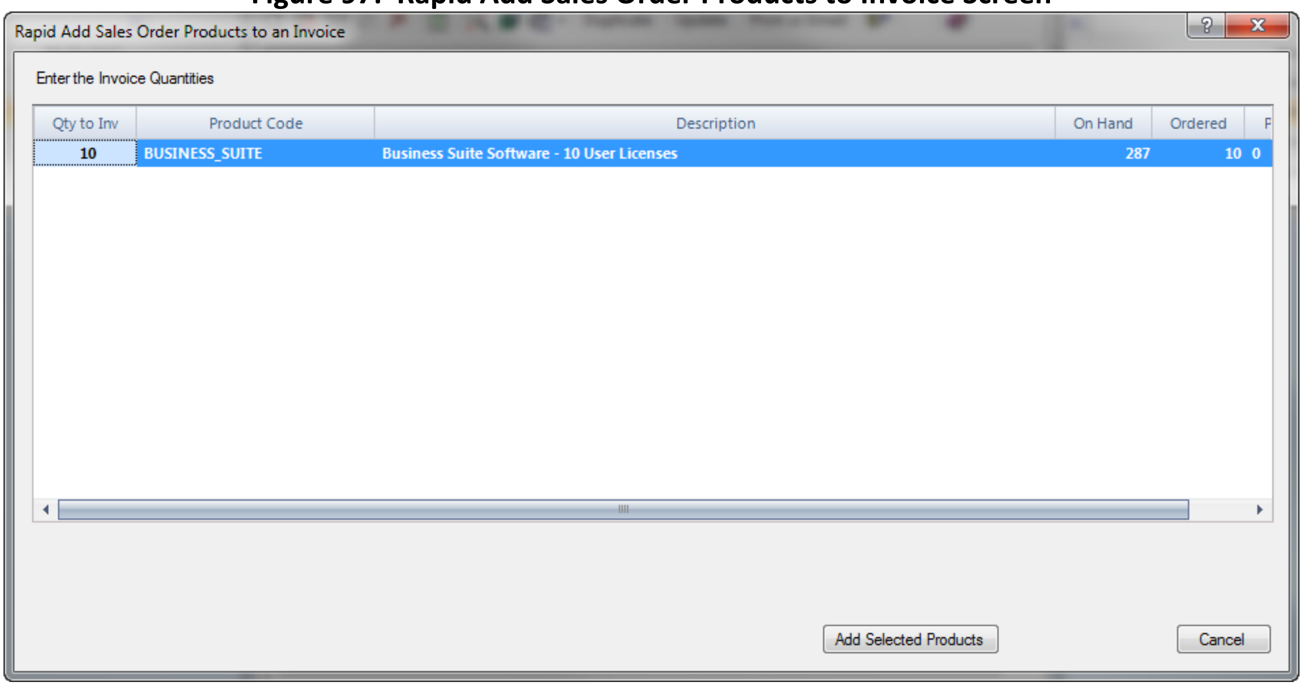
4. A confirmation question will appear. Click “Yes” to create a partial Invoice from the Sales Order.

Figure 96: Sales Order Conversion Message



5. The **Rapid Add Sales Order Products to an Invoice** screen will appear. Enter the desired Invoice quantity in the first column. Refer to the “Ordered” and “Prev. Inv.” Columns for reference.

Figure 97: Rapid Add Sales Order Products to Invoice Screen



6. Click the **Add Selected Products** button.

7. A confirmation message will appear with the Invoice number.

How to Copy or Duplicate an Existing Sales Order

1. On the **Finances** tab, in the **Sales Order** group, click **Manage**. The **Sales Order Data Management Center** will appear.

2. Double-click on the Sales Order you would like to open.

3. Click the **Duplicate** button that appears on the upper toolbar of the **Sales Order** screen.

4. Click the **Yes** button to confirm that you would like to duplicate the Sales Order.

5. A message will display the Sales Order Number of the newly created record. To open the new Sales Order, use the Sales Order DMC to search for the new Sales Order number.

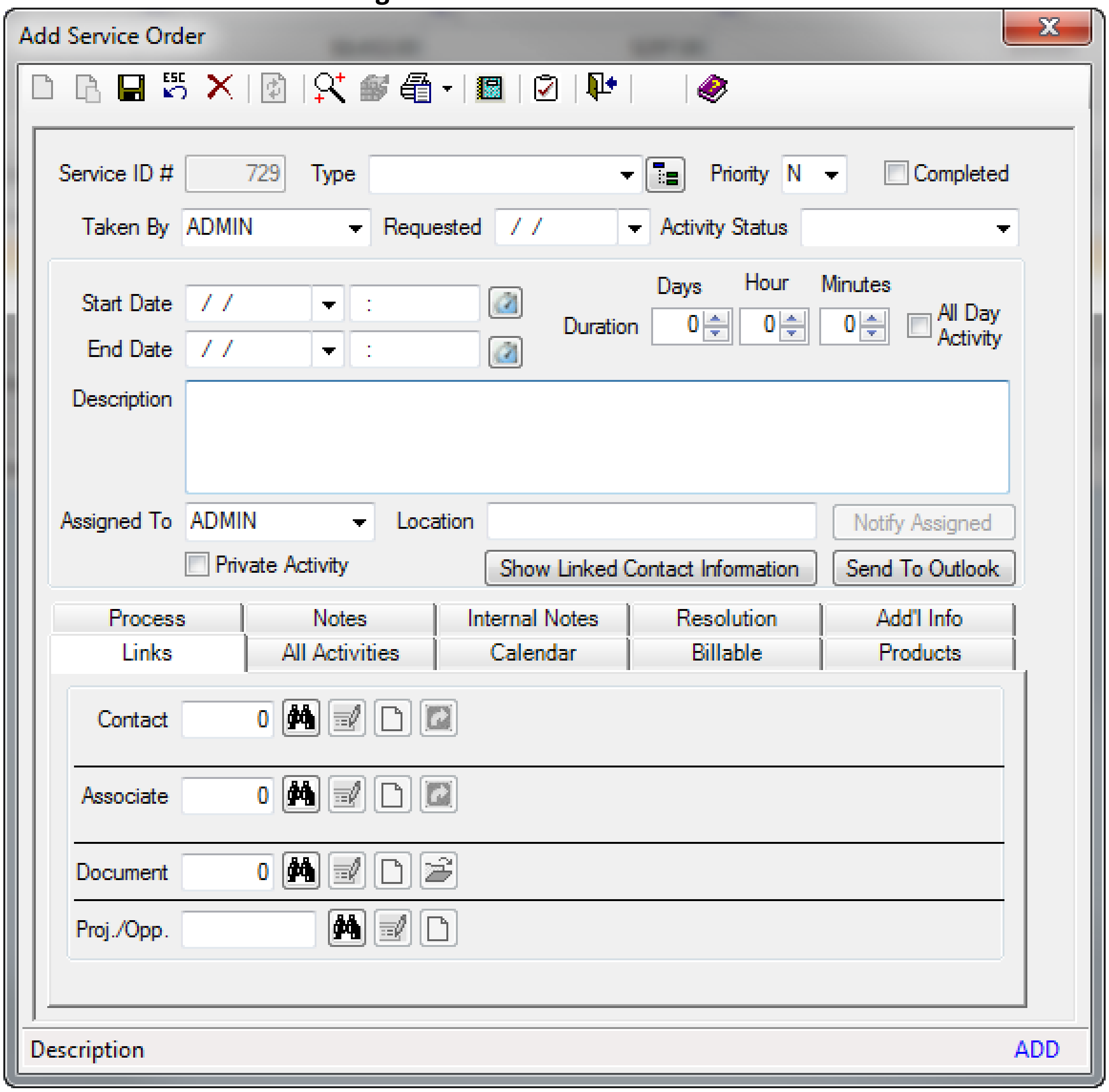
Service Orders

To Create a Service Order

Option 1: From the Main Menus

1. On the **Services & Projects** tab, in the **Service Orders** group, click **Add**. The **Add Service Order** screen will appear.

Figure 98: Service Order Screen



2. Choose the **Type** of service order you would like to schedule.

3. If the Service Order is considered a priority, change the priority to Yes.

4. The **Taken By** field will default to the logged in user. Change this field if necessary.

5. Fill out the appropriate information for the **Taken By, Requested,** and **Activity Status** fields.

6. Fill in the appropriate **Start** and **End** date and times.

7. Fill in a **Description** for the Service Order. (This is what will appear on your Calendar.)

8. To link a Contact to this Service Order, navigate to the **Links** tab. Click the binoculars icon. Choose the Contact that is associated with this record by double clicking on the Contact's name. You will be returned to the **Service Order** screen.

9. To identify if you would like the activity to appear in your calendar or to schedule a reminder alarm, navigate to the **Calendar** tab and choose the appropriate options.

10. To identify if the Service Order is Billable, navigate to the **Billable** tab and choose the appropriate options.

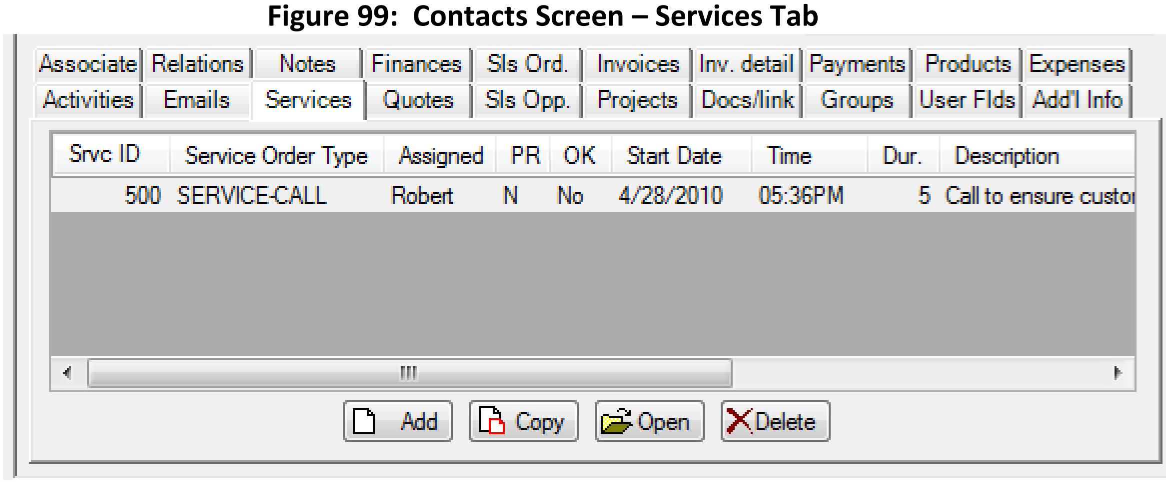
11. Click the **Save** icon to save the record.

Option 2: From a Contact Record

1. From the Contact Record (Refer to *How to Open an Existing Contact Record*), navigate to the **Services** tab.

2. Select the **Add** button under the **Services** tab.

Figure 99: Contacts Screen – Services Tab



3. The **Service Order** screen will appear. Please refer to *Option 1* in this section for instructions on how to complete screen.

To Change or Edit a Scheduled Service Order

Option 1: From the Service Orders Data Management Center (DMC)

1. On the **Services & Projects** tab, in the **Service Orders** group, click **Manage**. The **Service Orders Data Management Center** will appear.

2. Conduct a search for the Sales Opportunity.

3. Double-click on the Sales Opportunity you would like to open

4. The **Service Order** screen will appear. Edit the information as necessary.

5. Click the icon to save the record.

Option 2: From a Contact Record

1. From the Contact Record (Refer to *How to Open an Existing Contact Record*), navigate to the **Services** tab.

2. Highlight the Service Order that you would like to edit.

3. Click the **Open** button under the **Services** tab.

4. The **Service Orders** screen will appear. Edit the information as necessary.

5. Click the icon to save the record.

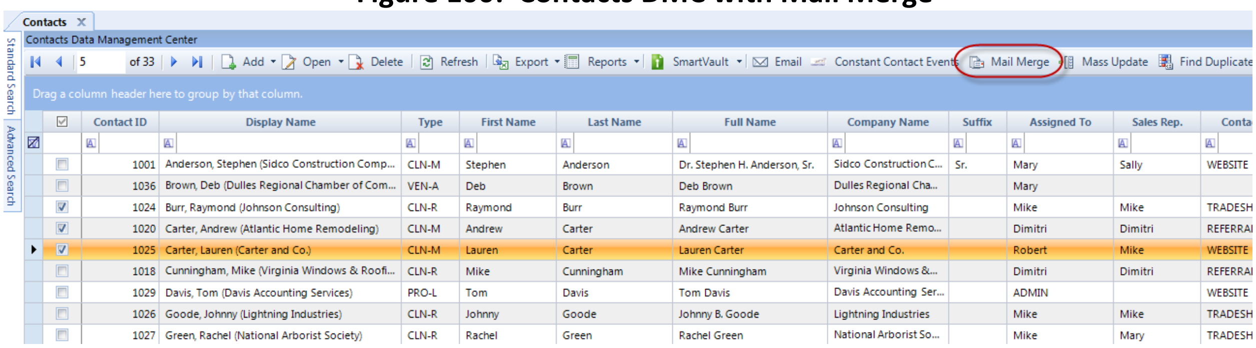
Mail Merge

Using Mail Merge

1. From the Contacts DMC, select a contact that you would like to include in the Mail Merge by placing a check in the corresponding row.

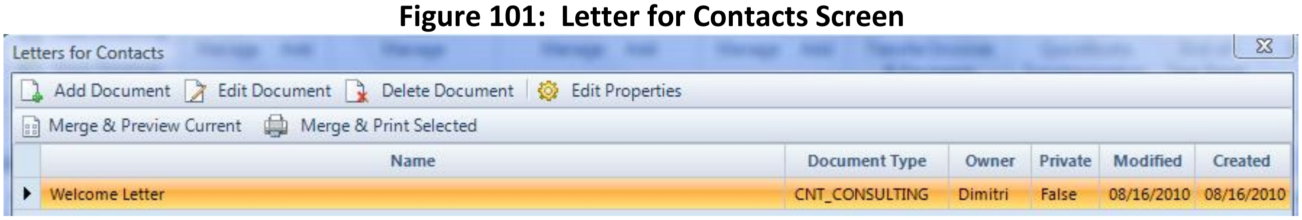
2. Click the **Mail Merge** button.

Figure 100: Contacts DMC with Mail Merge



3. The Letters for Contacts screen will display.

Figure 101: Letter for Contacts Screen



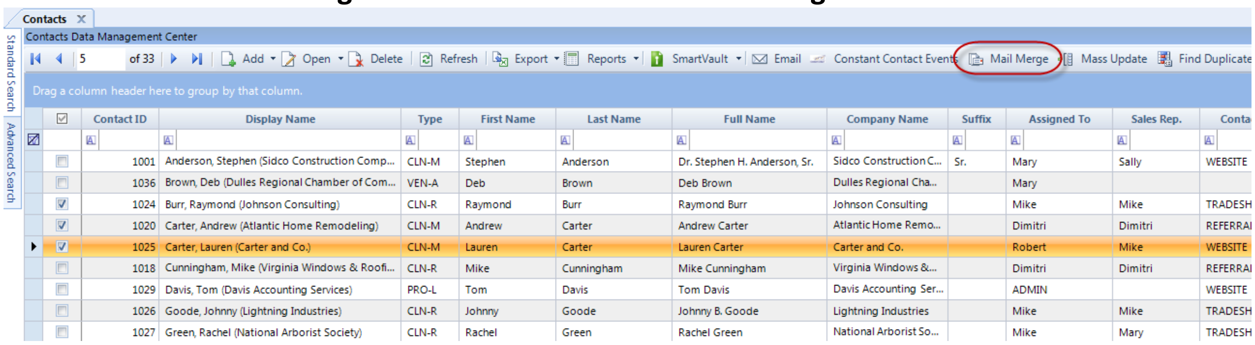
4. Select the document from the available list.

5. Select one of the following buttons:
   - **Merge & Preview Current** – Merges the selected record and opens the document so it becomes available for editing before printing.
   - **Merge & Print Selected** – Merges the selected record and sends directly to the printer.

Creating a New Mail Merge Document

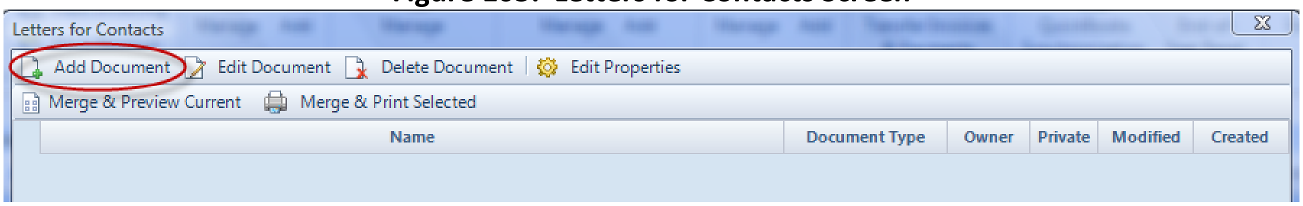
1. Click the **Mail Merge** button at the top of the Contacts DMC.

Figure 102: Contacts DMC - Mail Merge Button



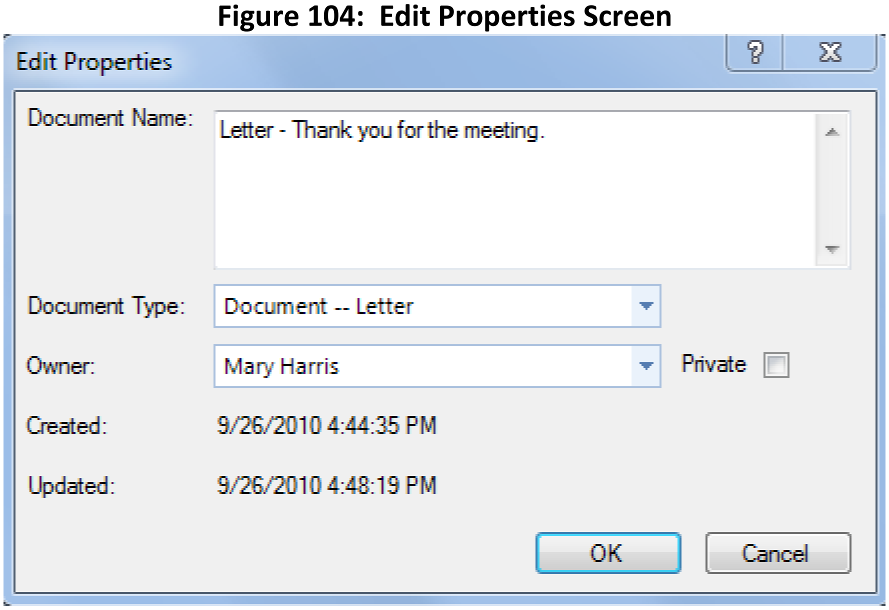
2. The **Letters for Contacts** screen will display. Select the **Add Document** button.

Figure 103: Letters for Contacts Screen



3. The **Edit Properties** screen will display.

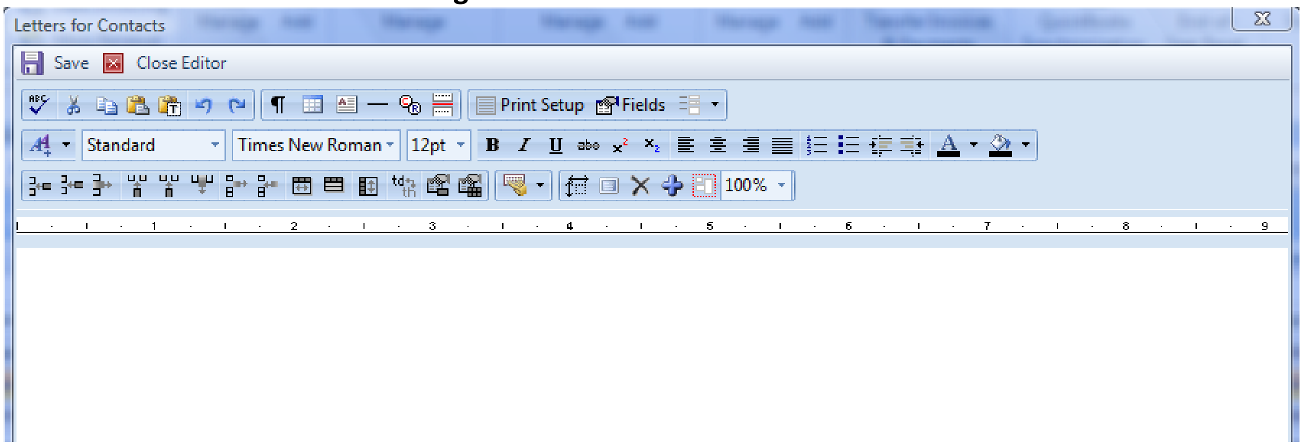
Figure 104: Edit Properties Screen



4. Fill in the appropriate information on the screen, including a **Document Name, Document type** and **Owner.** If this letter is only intended for the Owner, select the **Private** box. Click **OK**.

5. Results word processor will open.

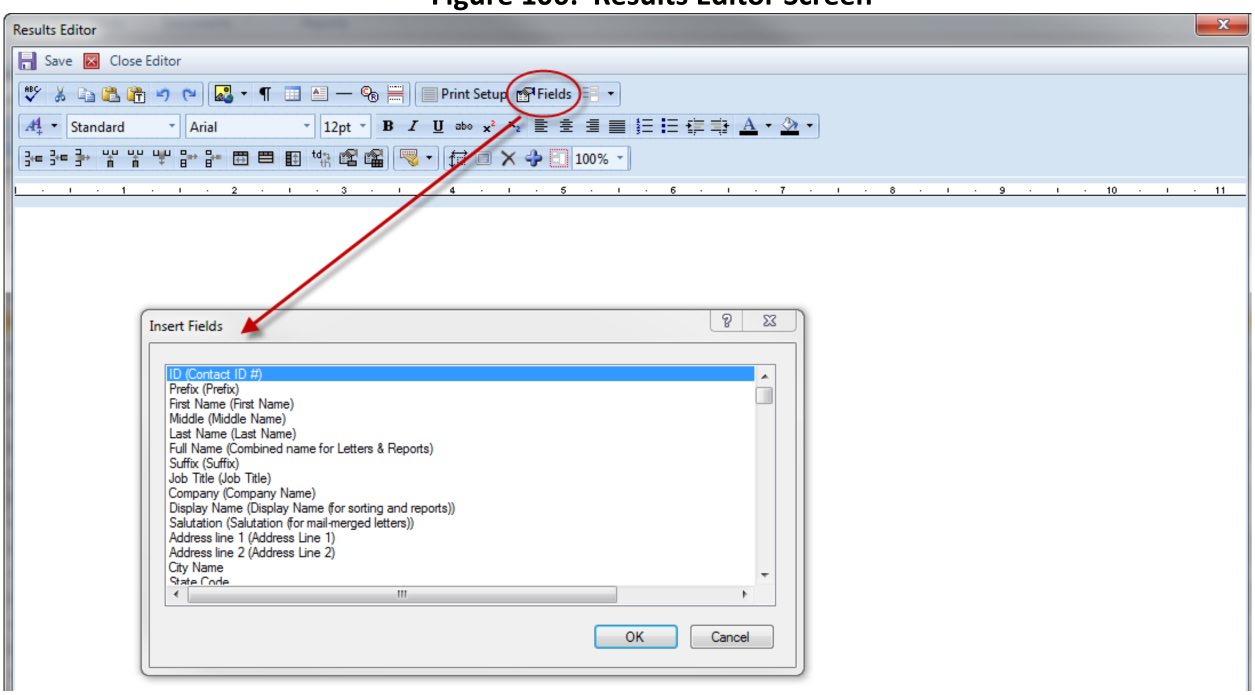
Figure 105: Results Editor Screen



6. Type your letter or document.

7. To insert a mail merge field into the letter, select the **Fields** button in the menu bar. The **Insert Fields** screen appears.

Figure 106: Results Editor Screen



8. Highlight the field you would like to insert and click **OK**.

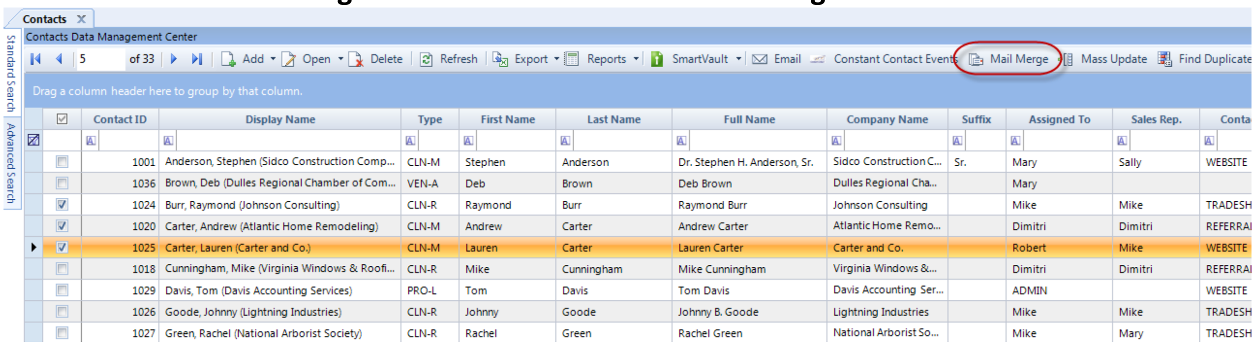
9. When you are finished typing the document, click the **Save** button.

10. The new document will now appear as a selection when you access the Mail Merge feature.

Editing Mail Merge Documents

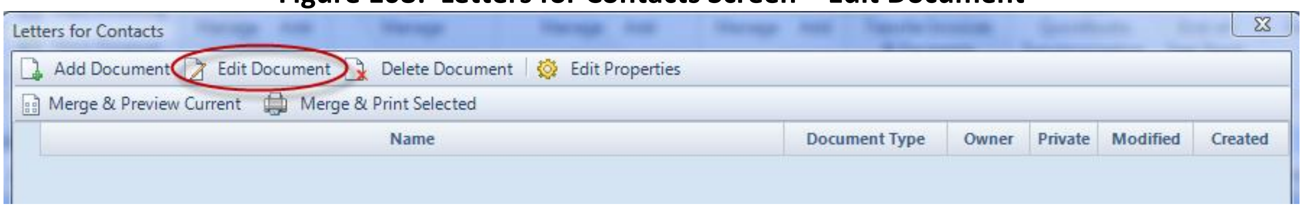
1. Click the **Mail Merge** button at the top of the Contacts DMC.

Figure 107: Contacts DMC - Mail Merge Button



2. The **Letters for Contacts** screen will display. Select the **Edit Document** button.

Figure 108: Letters for Contacts Screen – Edit Document

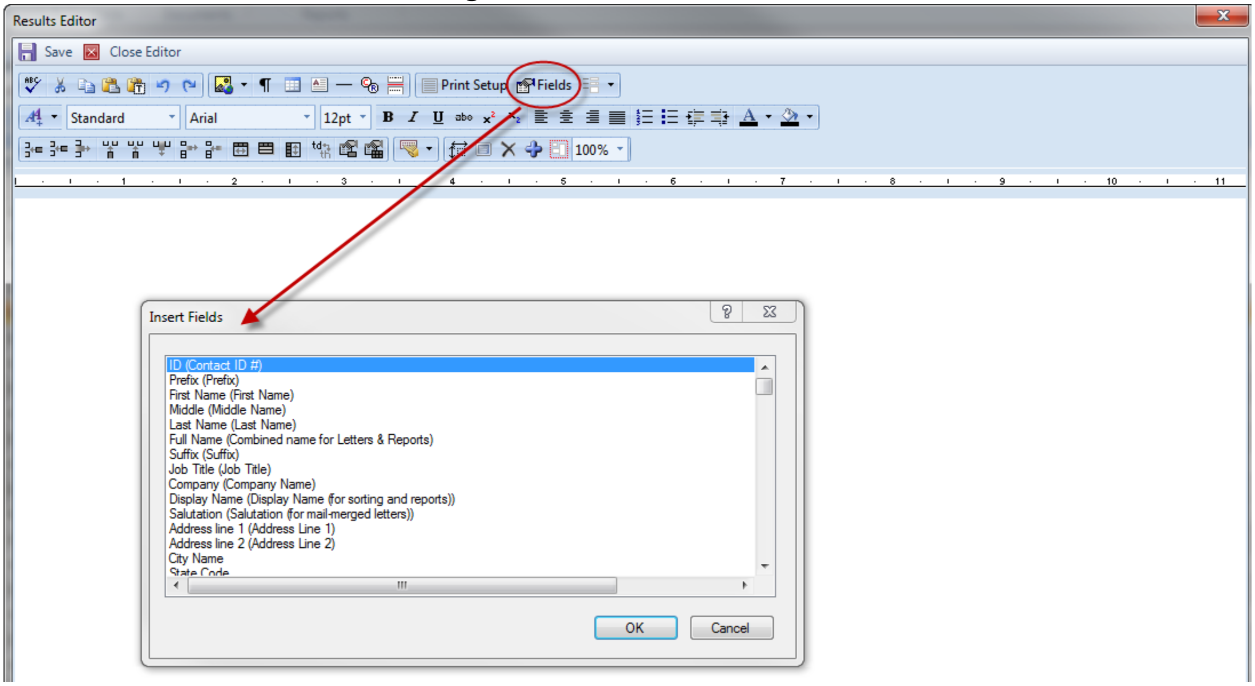


3. Results word processor will open the selected file.

4. Edit the letter or document as necessary.

5. To insert a mail merge field into the letter, select the **Fields** button in the menu bar. The **Insert Fields** screen appears.

Figure 109: Insert Fields Screen



6. Highlight the field you would like to insert and click **OK**.

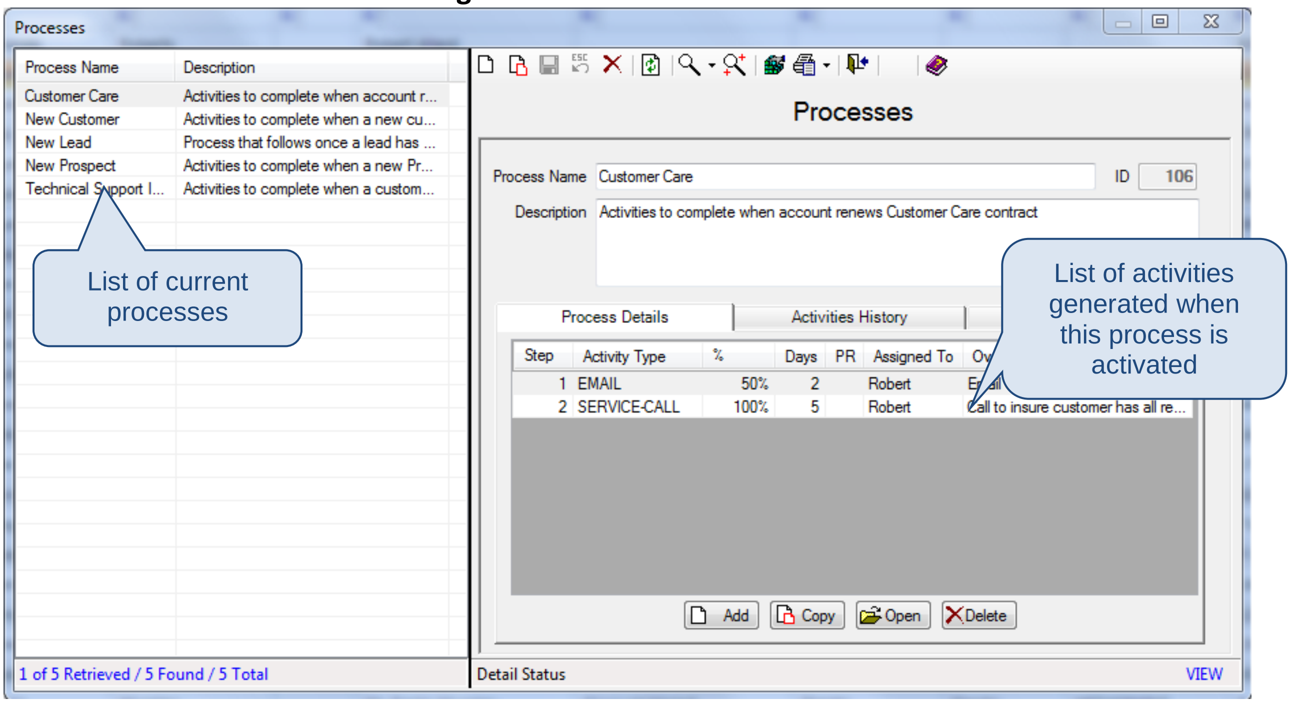
7. When you are finished typing the document, click the **Save** button.

Automated Processes

To Create a Process

1. On the **Setup** tab, in the **Processes** group, click **Maintain Processes**. The Process screen displays.

Figure 110: Processes Screen



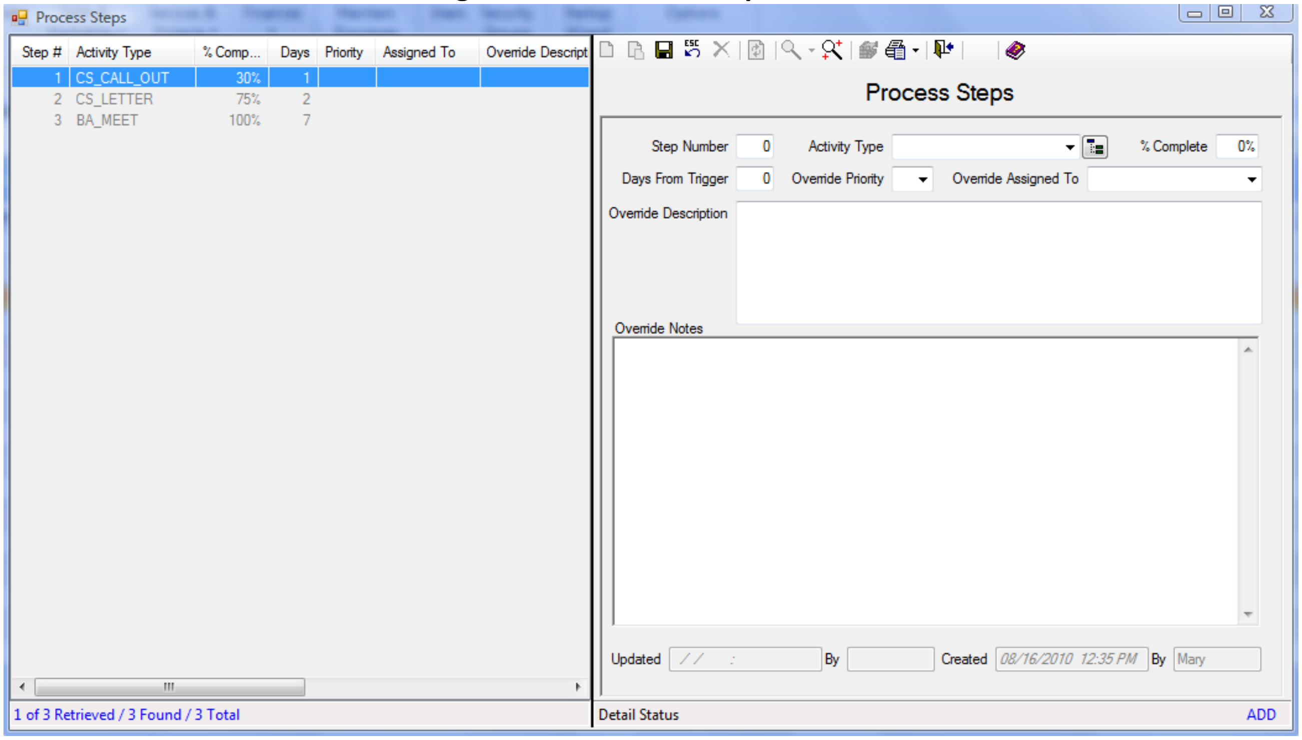
2. Click the **Add** icon in the toolbar.

3. Type in a **Process Name** and **Description** for the new process.

4. Click the **Save** icon in the toolbar.

5. To add steps to this process, select the **Add** button at the bottom of the screen. The following screen appears:

Figure 111: Process Steps Screen



6. Enter the following information for the activity:
    a. **Step Number**
    b. **Activity Type**
    c. **Days from Trigger**
    d. **Override Priority** (The default priority level is "Normal".)

7. Each Activity within the process will automatically be assigned to the person/user that activates the process. To override this default and assign the activity to a particular person, select a value for the **Override Assigned To** field.

8. Click the **Save** icon in the toolbar.

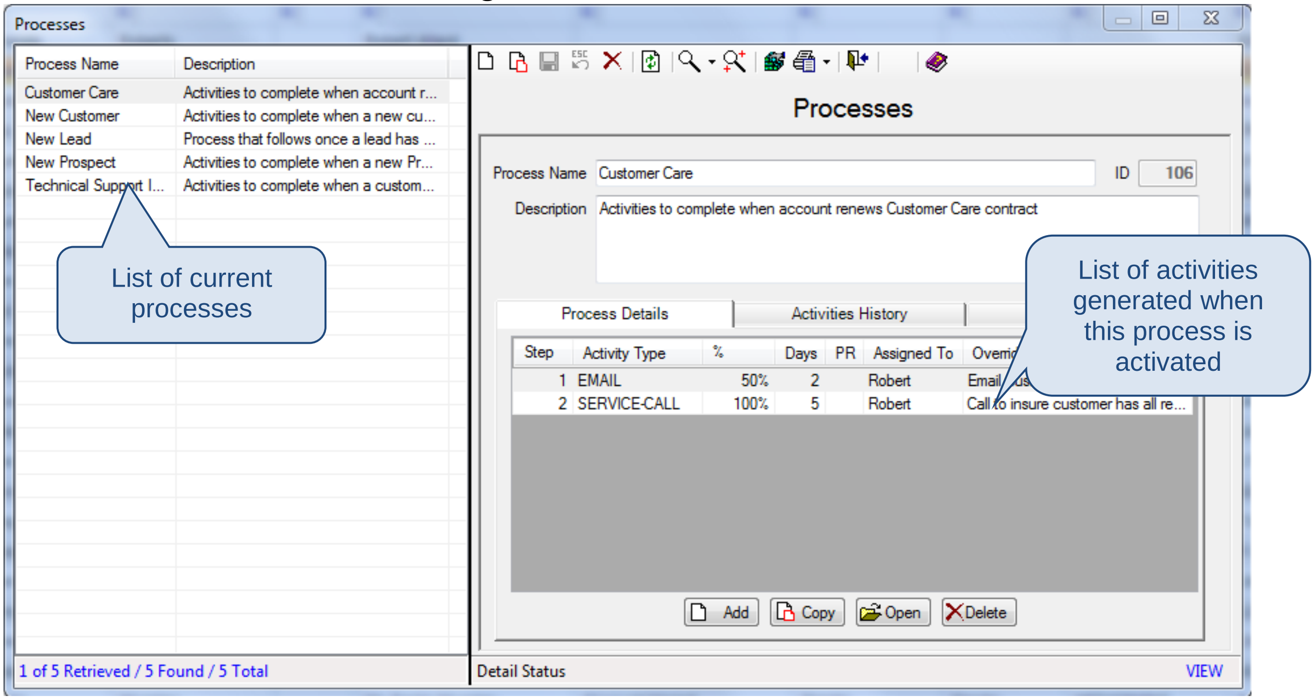
9. Add additional steps to the process by clicking the **Add** icon in the toolbar and repeating Steps 6-9.

10. When you are done adding activities to the process, close the screen.

To Edit a Process

1. On the **Setup** tab, in the **Processes** group, click **Maintain Processes**. The Process screen displays.

Figure 112: Processes Screen



2. Select the process you would like to edit by clicking on the Process Name from within the list of current processes.

3. The information associated with the process will appear on the right-hand portion of the screen.

4. If necessary, edit the **Process Name** and **Description**. Click the **Save** icon in the toolbar.

5. To add or edit steps to this process, select the **Add** or **Open** button at the bottom of the screen. The Process Steps screen displays

6. Select the Process Step on the **Process Details** tab that you would like to edit or delete.

7. Make changes as necessary and then click the **Save** icon in the toolbar. (For more information on this screen, refer to the "To Create a Process" section.)

8. To delete a Process Step, click the **Delete** icon in the toolbar.

9. Add additional steps to the process by clicking the **Add** icon in the toolbar. (For more information on this screen, refer to the "To Create a Process" section.)

10. Click the **Save** icon in the toolbar.

11. When you are done editing activities in the process, close the screen.

To Activate a Process

There are several ways to activate a process:

- Automatically (based on Contact Type)
- Automatically (based on Activity or Service Order completion)
- Manually (Contacts Screen, the Contacts DMC, Sales Opportunity screen or Project screen)

Automatically Based on Contact Type

Processes can be triggered automatically when the Contact Type is changed on the Contact screen. Please refer to the LookUp Tables Maintenance section for details on the Contact Type Lookup Tables.

Automatically Based on Activity or Service Order Completion

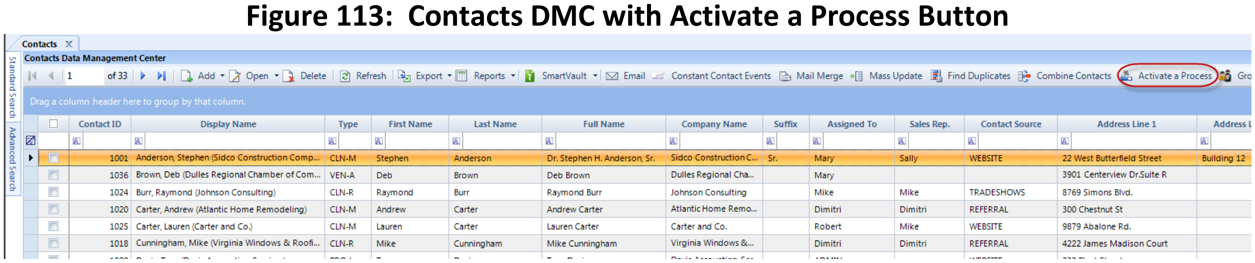
Processes can be triggered automatically when an Activity or a Service Order is completed. Please refer to the LookUp Tables Maintenance section for details on the Activity Types Lookup Tables.

Manually

Processes can be triggered manually from the Contacts DMC, the Contact screen, the Sales Opportunity screen or a Project screen.

1. To activate a process from the Contacts DMC, select the record and click the **Activate a Process** button.

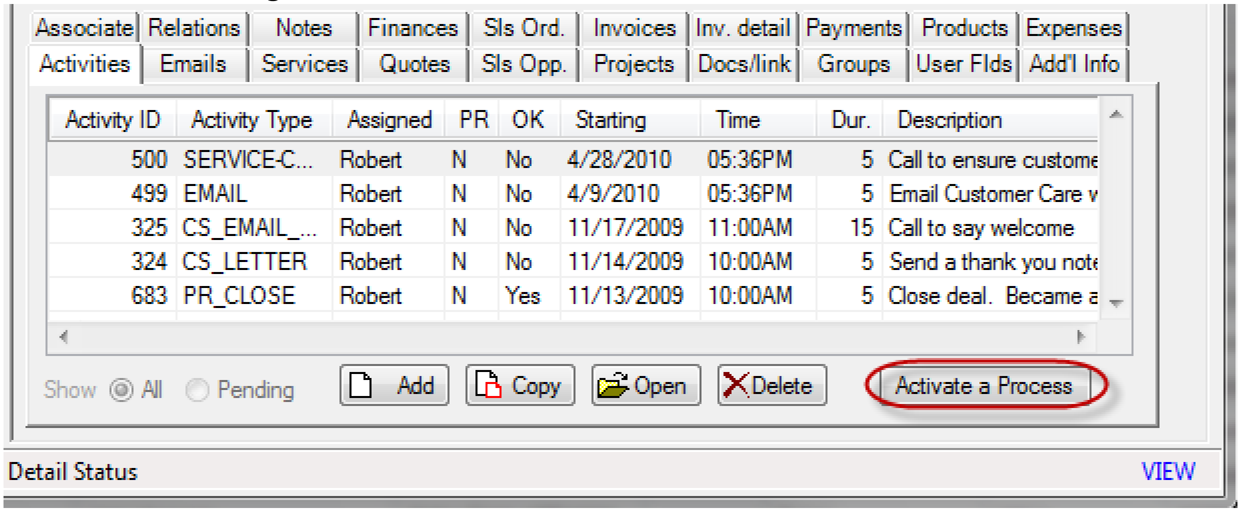
Figure 113: Contacts DMC with Activate a Process Button



OR

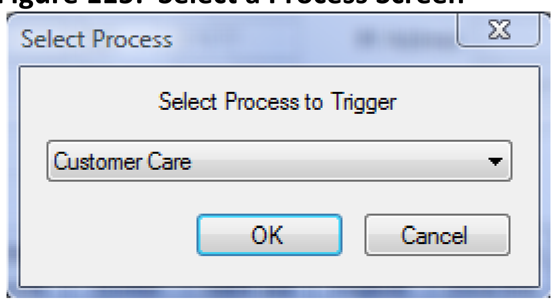
To activate a process from the Contacts DMC, a Contact record, Project, or Sales Opportunity record, open the appropriate screen and click the **Activate a Process** button on the Activities Tab.

Figure 114: Activities Tab with Activate a Process Button



2. Select the process you would like to activate from the drop-down list.

Figure 115: Select a Process Screen



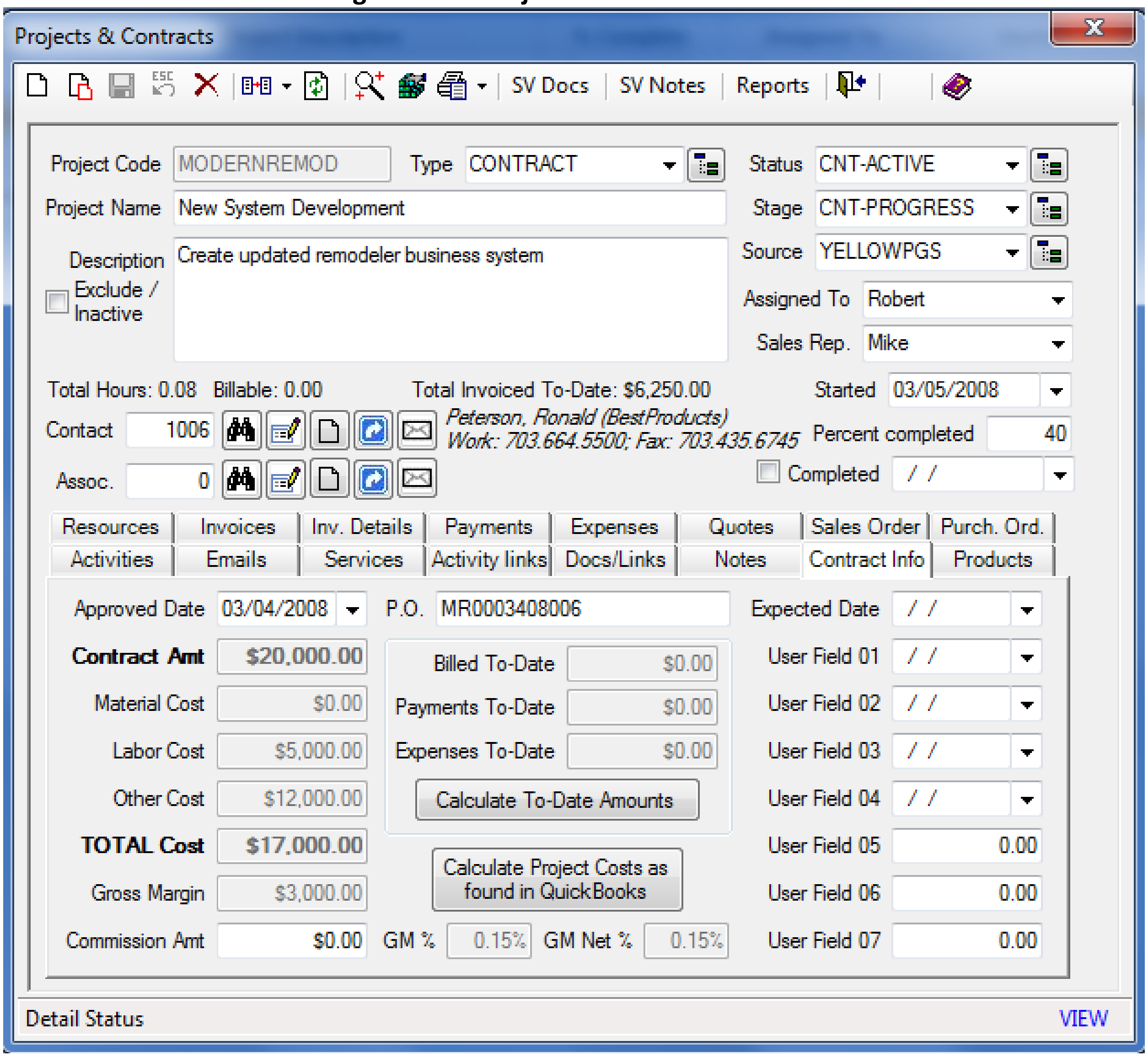
3. Click the **OK** button. The activities associated with this process will now appear under the Activities Tab. In addition, they will show up on the appropriate User's calendar or task list.

Projects & Contracts

The project management module offers a central place to see detailed information about various types of projects. In addition to capturing general information and status, you can track associated activities, documents, notes resources and financial information (invoices, payments and expenses).

The figure below displays the Project & Contract screen.

Figure 116: Projects & Contracts Screen



Tab Name	What does it show about the project?
Activities	Past or future appointments, meetings, and tasks associated with this project.
Emails	A list of all emails associated with the project.
Services	A list of Service Orders associated with the project.
Activity Links	A list of contacts that are associated with the activities listed on the Activity tab.
Doc/Links	Associated documents and files such as proposals, contracts, images, etc.
Notes	Notes about the account. (Searches can be performed against the contents of this field.)
Contract Info	Financial information including costs, Gross Margin, invoicing totals, etc. Also displays User Defined date fields.
Products	Associated and custom products used with the project.
Resources	Associated resources including who will be working on the project, the periods of time, their billable rate and the default service/task performed.
Invoices	Associated Invoices.
Invoice Detail	Line items from the associated invoices.
Payments	Payments received or applied to the associated invoices.
Expenses	Expenses associated with this project.
Purchase Orders	A list of Purchase Orders associated with the project. You can also add Purchase Orders from this tab.
Sales Orders	A list of Sales Orders associated with the project. You can also add Sales Orders from this tab.
Quotes	Lists associated Quotes.

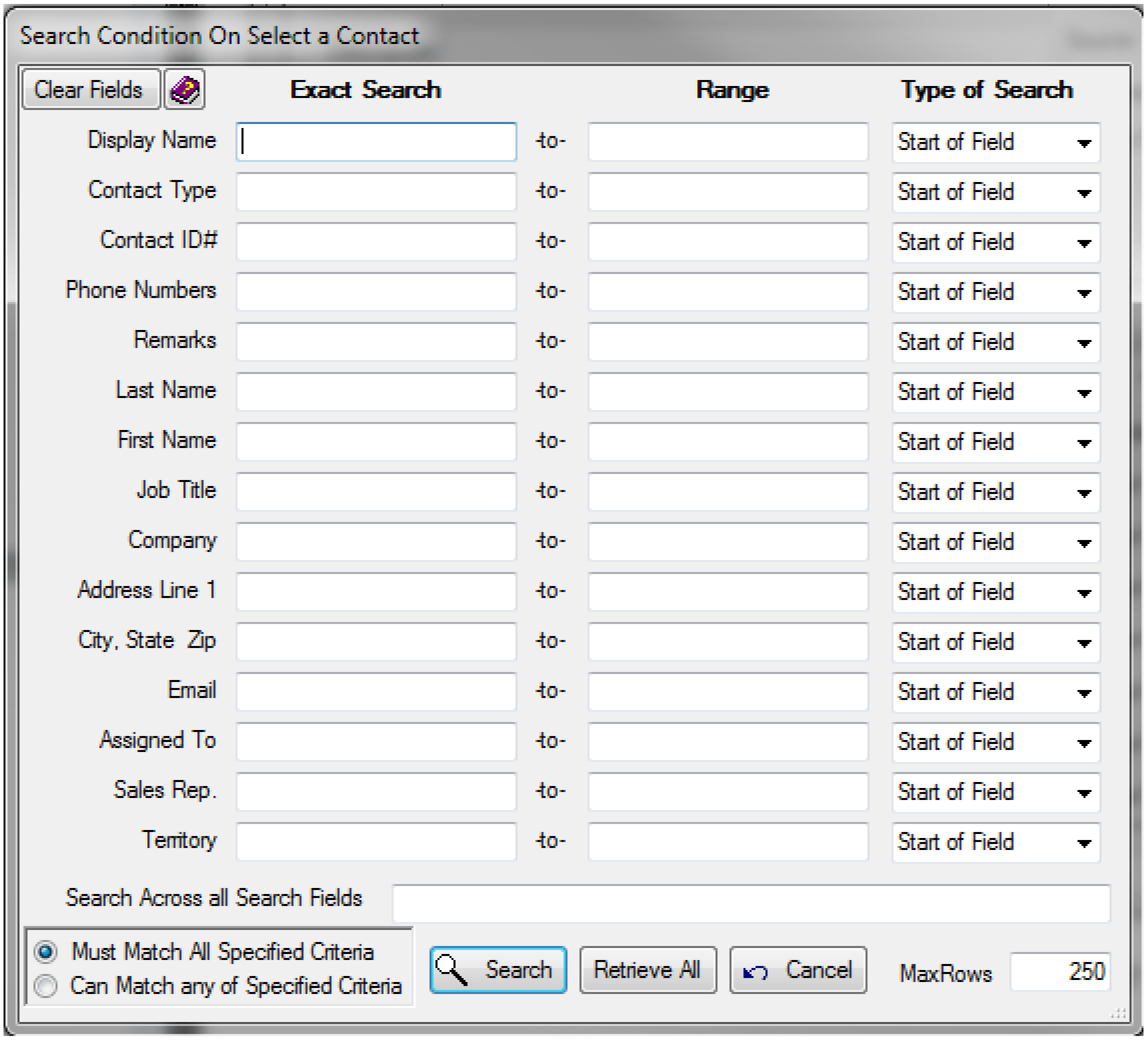
How to Add a Project

1. On the **Services & Projects** tab, in the **Projects & Contracts** group, select **Add**.

2. The **Project Code** will be filled out for you based on what is defined in the Configuration options. (Refer to Configuring Project Codes.)

3. In the top portion of the screen, enter the information that you would like included in the Project.

4. To link a Contact to this opportunity, type in the Contact ID in **Contact** field or, to search for a contact, click the binocular icon. The following screen will appear:



Type in relevant contact information for the contact you would like to link to this project. Click **Search**. A list of contacts meeting the Search criteria will display. Double-click on the Contact you would like to link to the Project.

5. After returning to the Project, click the **Save** icon to save the record.

Configuring Project Codes

The Project Code that appears on the Project & Contracts screen can be configured using the Configuration Options screen.

Note: If you decide to change the way this field is configured, you would need to make the corresponding change in every INI file on the server (while the users are **not** in the system) or have each user change it from the Configuration Options screen.

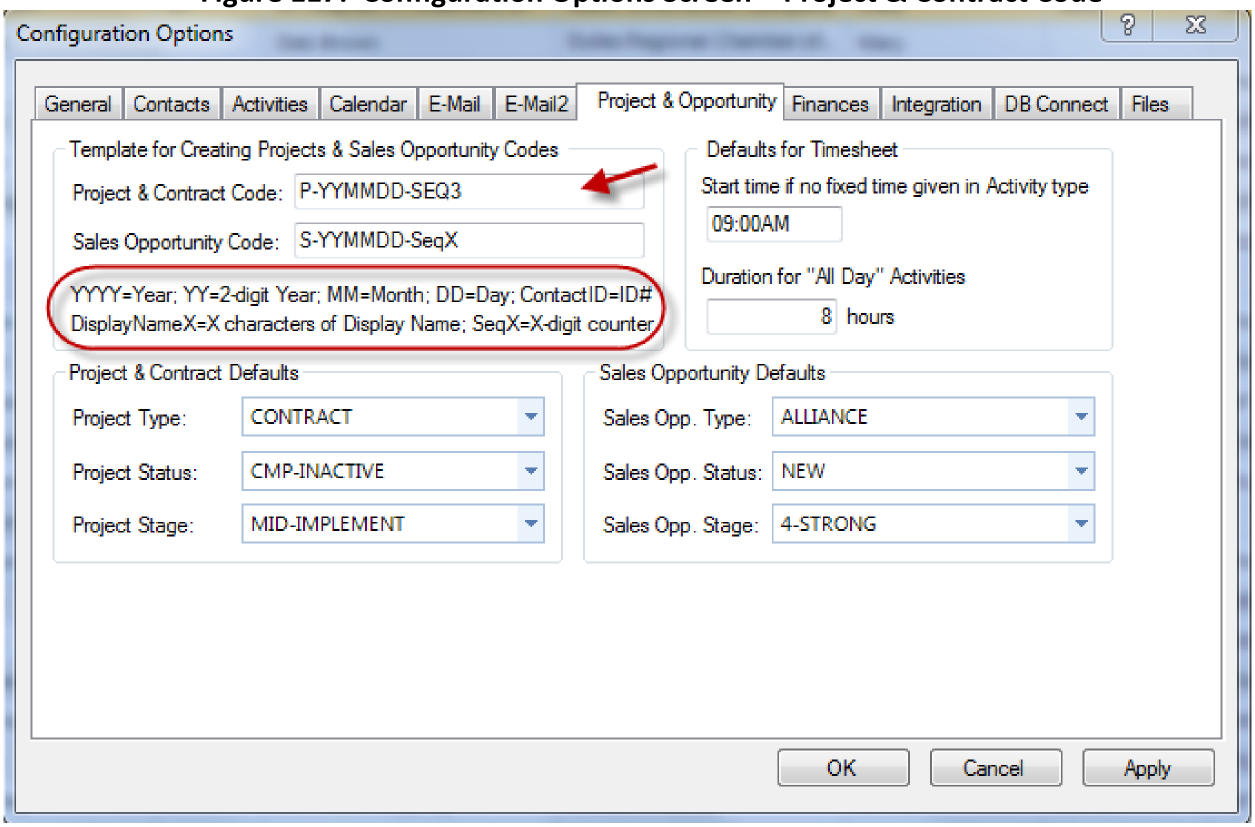
To Configure Project Codes:

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The **Configuration Options Screen** will appear.

2. Navigate to the Project & Opportunity tab.

3. Use the key provided on this screen to configure a new code structure. Type the configuration into **Project & Contract Code** the field.

Figure 117: Configuration Options Screen – Project & Contract Code



4. Click **Apply**.

In the example above, when a Project is added, the code will have the letter “P-“, followed by the two digit year, the two digit month, and the two digit day of the month. This will be followed by a hyphen and the ContactID. If you expect to add more than one project for the same Contact on the same day, the Code would no longer be unique after the first Project is added.

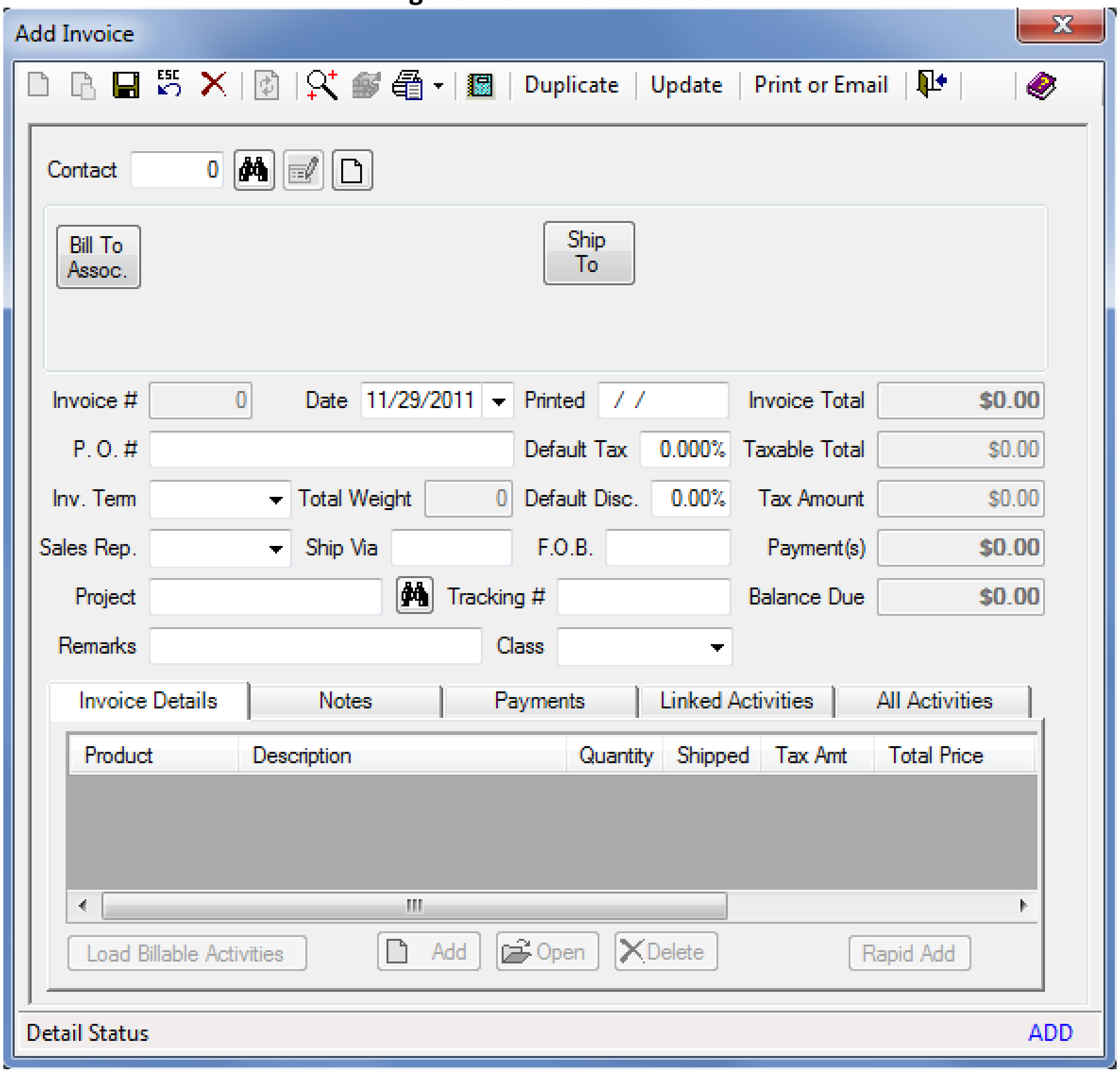
To support multiple projects in a single day, use the SEQX in the structure of the Project Code. For example, if you use “YYMMDD-ContactID-SEQ3”, it will support up to 999 unique projects per day per Contact. Use SEQ2 instead of SEQ3, to support up to 99 unique codes per day per contact.

Invoices

How to Create an Invoice

1. On the **Finances** tab, in the **Invoices** group, click **Add**. The Invoice Screen displays.

Figure 118: Invoices Screen



2. To search for an existing Contact, select a **Search**  icon next to the Contact field OR to add a new contact record, click the **New** icon next to the Contact field.

3. The selected or added Contact will automatically populate the **Bill To** and **Ship To** addresses. To change either of these, click the respective buttons. A list of Associate records for the selected Contact will appear. Double-click the desired address.

4. Fill in appropriate information on the top portion of the Invoice screen.

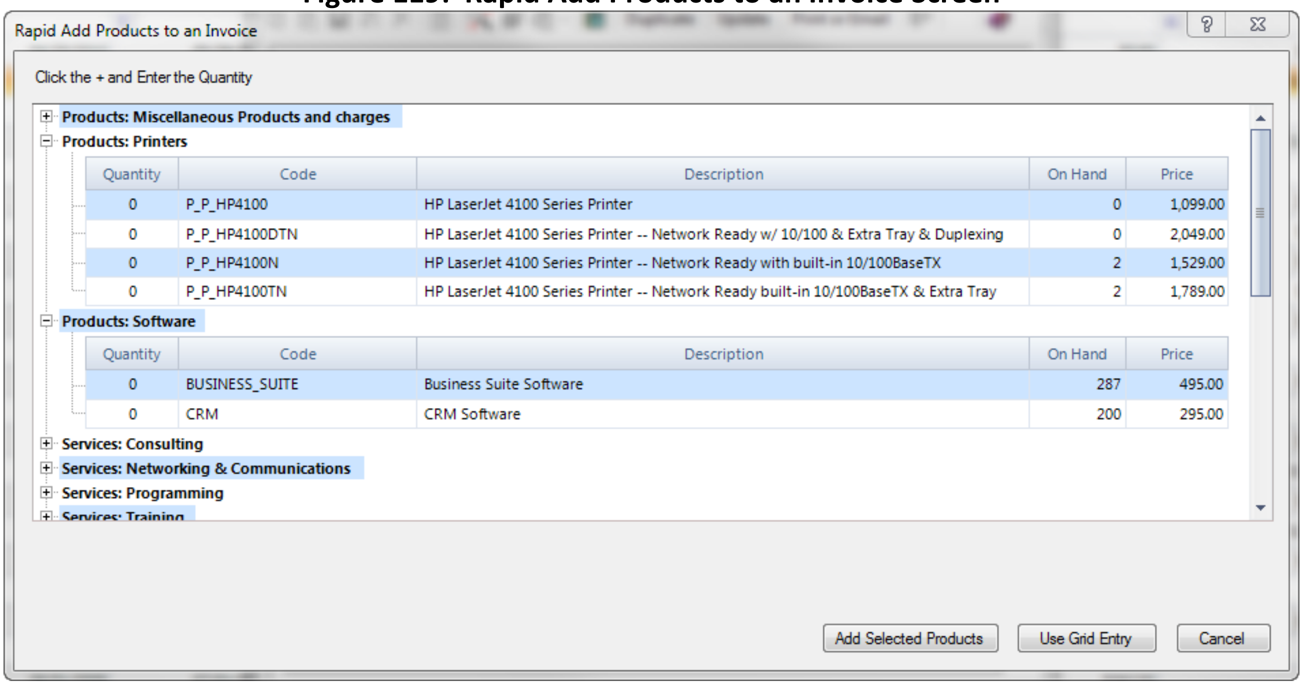
5. Click the save icon to save the record. The buttons in the Invoice Detail part of the screen will now become available.

6. Choose one of the following ways to add line items to the invoice:

    a. **To bill for completed services**: Click the **Load Billable Activities** button. All completed, billable activities associated with this contact will be available to be selectively loaded as line items on this invoice.

    b. **To bill for single items at list price:** Click the **Rapid Add** button and select the products you would like to have appear on the invoice. Click the **Add Selected Products** button. **Note:** Once the screen is open, the system will quickly find the desired product when you start typing the first letters of the product name.

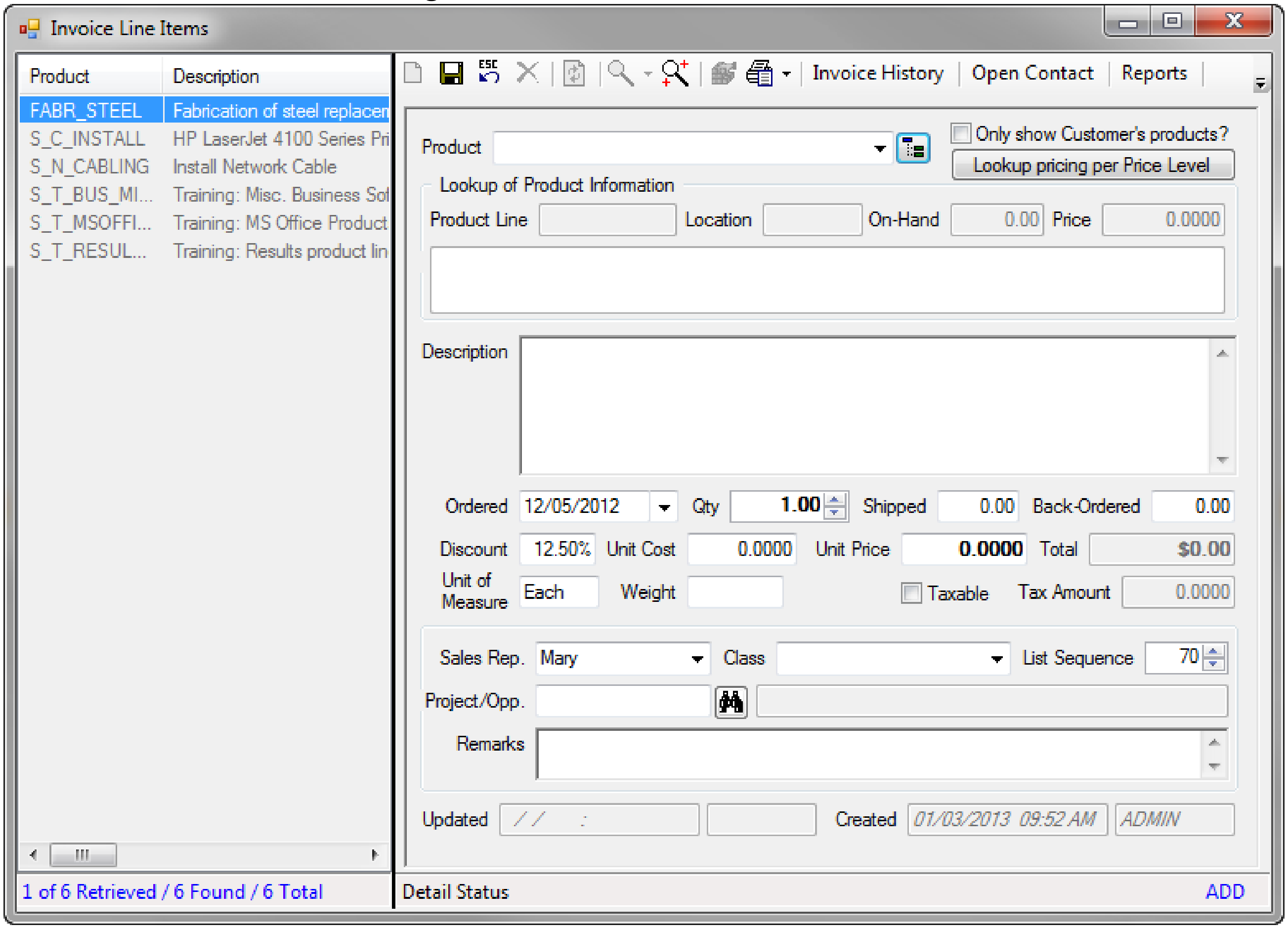
Figure 119: Rapid Add Products to an Invoice Screen



Note: The **Use Grid Entry** button provides another way to enter data in a Grid View. Once data is entered on a screen, you cannot switch views as the button will be temporally grayed out.

    c. **To add more than one quantity of an item** *or* **to add an item with a price other than the default price**: Click the **Add** button to open the Invoice Line Items screen. Select a **Product** from the drop down and change other fields on the screen as necessary. Click the **Save** icon to save the record. To add another line item, click the Add icon and repeat this step as necessary. Close the screen when you have added all line items.

Figure 120: Invoice Line Items Screen



Note: Once a Product is selected, click the **Invoice History** button or the **Open Contact** button in the upper tool bar to view the sales history of the selected product. For more details, refer to "Viewing Product Sales History When Creating an Invoice".

7. When you are done adding line items, click the icon to save the Invoice.

Viewing Product Sales History When Creating an Invoice

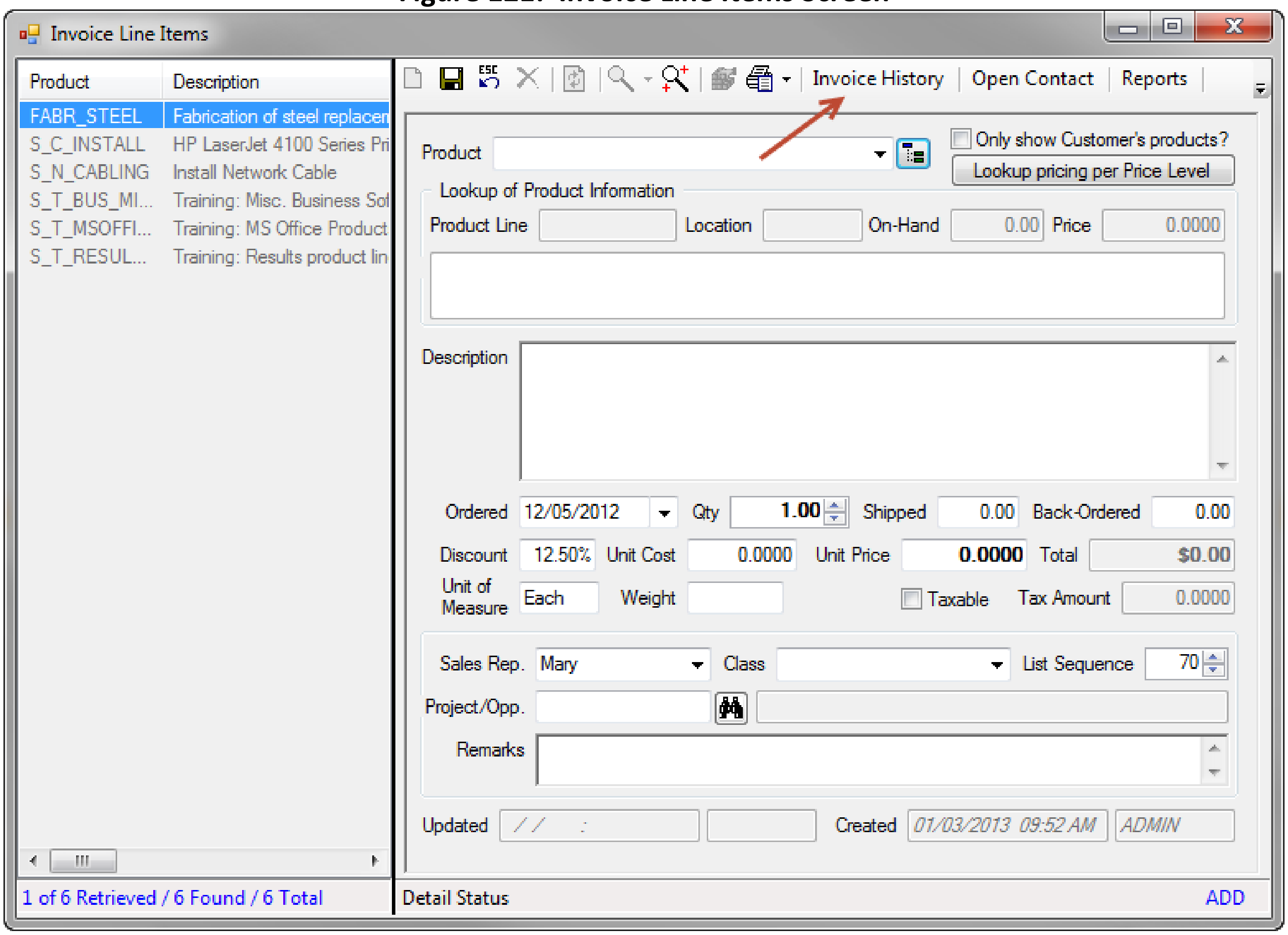
Viewing a product's sales history when creating an Invoice is helpful when you need to determine previous pricing, previous customers and other historical information about the Product.

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoice Data Management Center** will appear.

2. Double-click on the Invoice you would like to open.

3. Click the **Add** button on the Invoice Details tab. The Invoice Line Items screen appears.

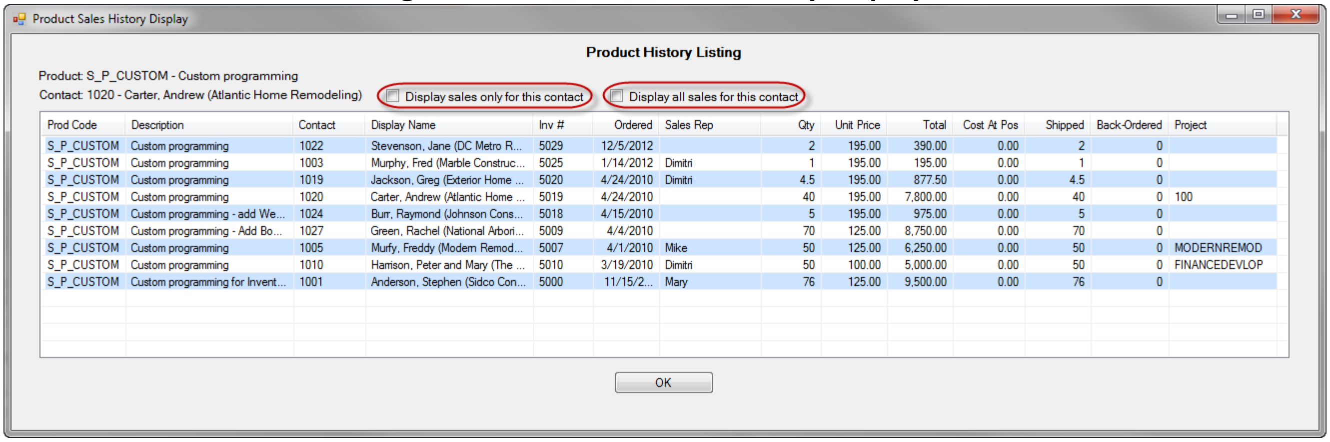
Figure 121: Invoice Line Items Screen



4. Select a **Product** from the Product drop-down list.

5. Once a product is selected, click the **Invoice History** button in the upper toolbar. The Product Sales History Display screen will appear.

Figure 122: Product Sales History Display



6. By default, all sales for selected Product will be displayed in the Product History Listing. To display the selected Product sales only for the selected contact, check "**Display sales only for this contact".** To display the entire Invoice History (for all products) for the current contact, check "**Display all sales for this contact**".

7. Click **OK** to close the screen and return to the Quote Line Items screen.

Note: Alternatively, click the **Open Contact** button in the upper toolbar to view the Contact Record of the selected contact. Navigate to the Invoice Details Tab or the Invoices Tab to view Sales History for that contact.

How to Update an Invoice

Once an Invoice is created, any edits should be made through the Update button located on the Invoice screen. This button allows you to edit the Contact field as well as update the various other fields on the line item level.

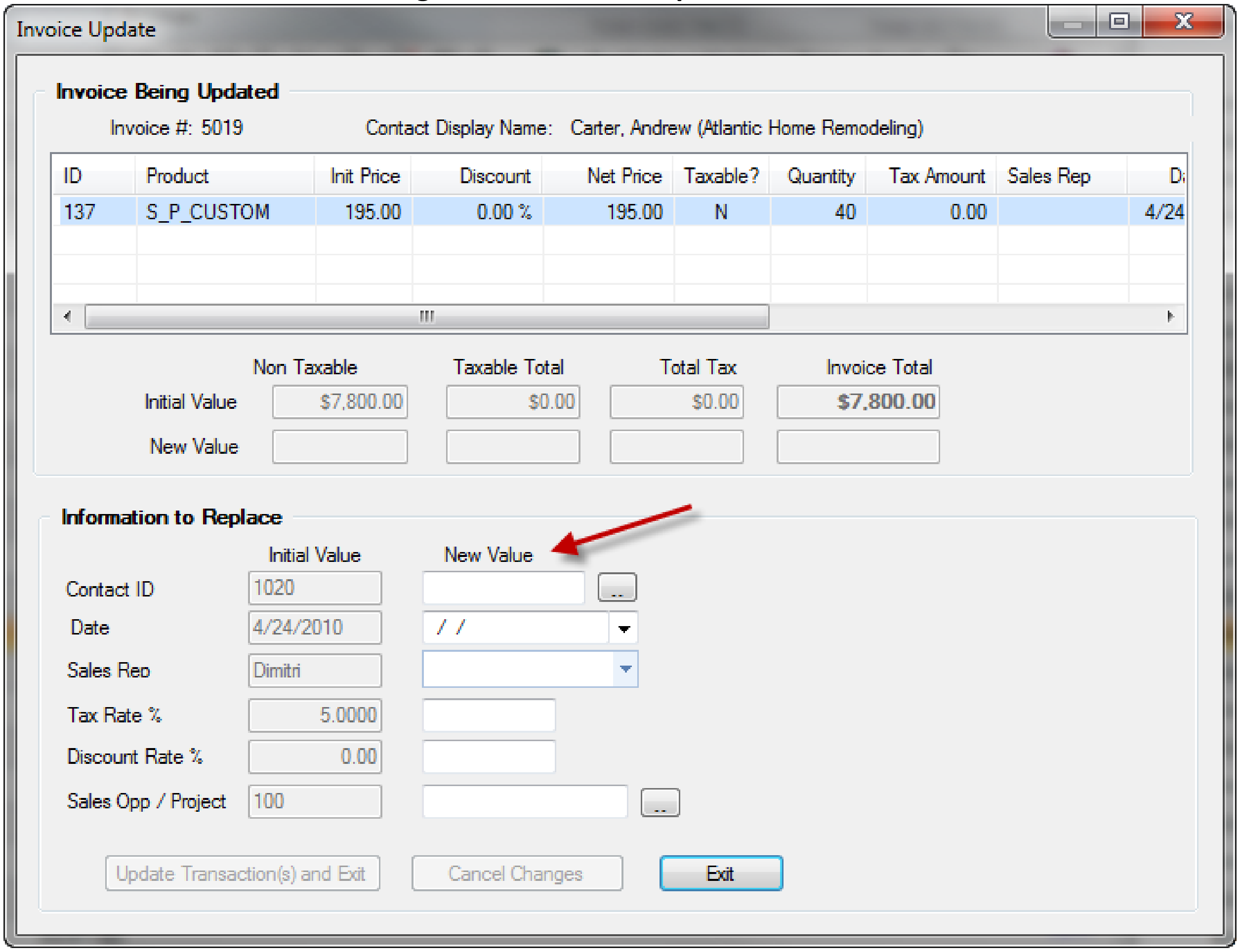
Note: Although some updates can be changed directly from the Invoice screen, these updates will not appear on the individual Product Line Items. Therefore, using the Update button is recommended so that changes are updated on the entire quote.

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoices Data Management Center** will appear.

2. Double-click on the Invoice you would like to open.

3. Click the **Update** button located in the toolbar. The Invoice Update screen appears.

Figure 123: Invoice Update Screen



4. In the **New Value** column, enter the new **Contact ID**, **Date**, **Sales Rep**, **Tax Rate**, **Discount Rate** and/or **Sales Opp/Project** information as necessary.

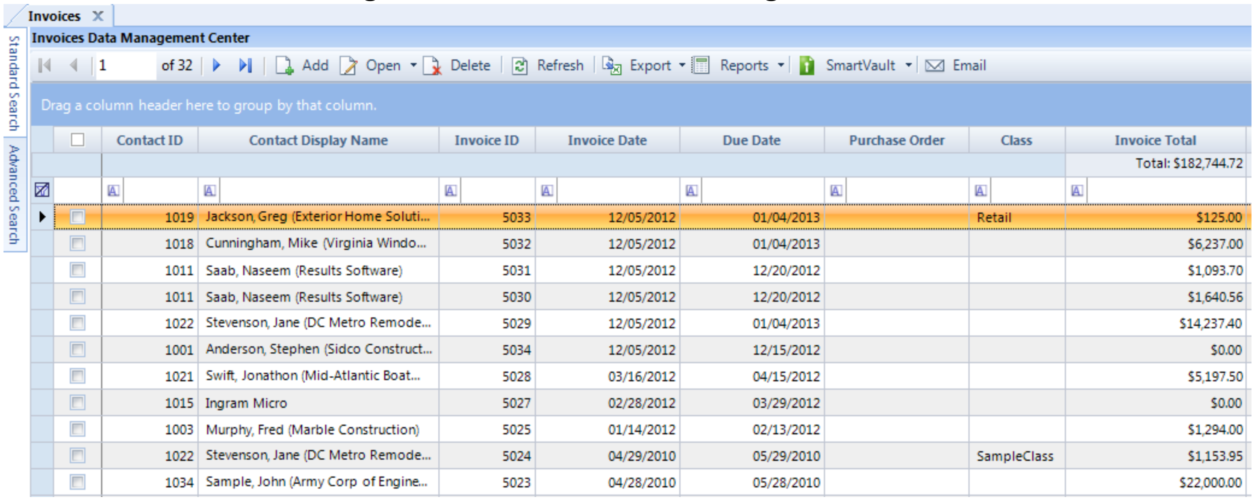
5. Click the **Update Transaction(s) and Exit** button.

How to Open an Existing Invoice

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoices Data Management Center** will appear.

2. Double-click on the Invoice you would like to open.

Figure 124: Invoices Data Management Center



Contact ID	Contact Display Name	Invoice ID	Invoice Date	Due Date	Purchase Order	Class	Invoice Total
							Total: $182,744.72
1019	Jackson, Greg (Exterior Home Soluti...	5033	12/05/2012	01/04/2013		Retail	$125.00
1018	Cunningham, Mike (Virginia Windo...	5032	12/05/2012	01/04/2013			$6,237.00
1011	Saab, Naseem (Results Software)	5031	12/05/2012	12/20/2012			$1,093.70
1011	Saab, Naseem (Results Software)	5030	12/05/2012	12/20/2012			$1,640.56
1022	Stevenson, Jane (DC Metro Remode...	5029	12/05/2012	01/04/2013			$14,237.40
1001	Anderson, Stephen (Sidco Construct...	5034	12/05/2012	12/15/2012			$0.00
1021	Swift, Jonathon (Mid-Atlantic Boat...	5028	03/16/2012	04/15/2012			$5,197.50
1015	Ingram Micro	5027	02/28/2012	03/29/2012			$0.00
1003	Murphy, Fred (Marble Construction)	5025	01/14/2012	02/13/2012			$1,294.00
1022	Stevenson, Jane (DC Metro Remode...	5024	04/29/2010	05/29/2010		SampleClass	$1,153.95
1034	Sample, John (Army Corp of Engine...	5023	04/28/2010	05/28/2010			$22,000.00

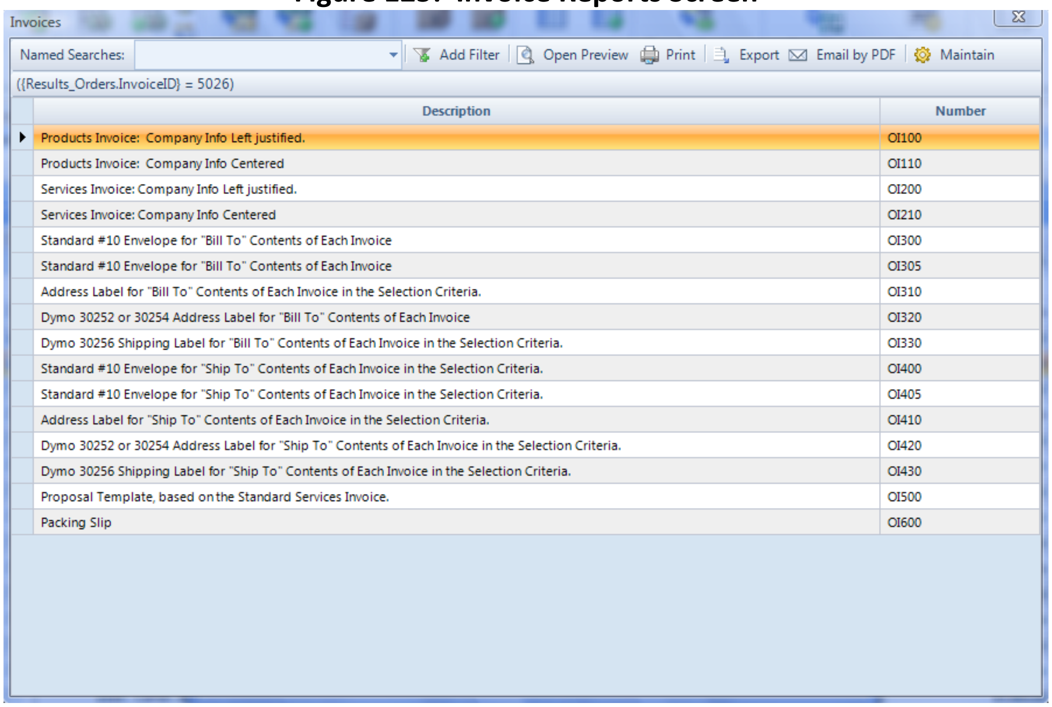
How to Print an Invoice:

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoices Data Management Center** will appear.

2. Double-click on the Invoice you would like to print.

3. Click the **Print or Email** button that appears on the upper toolbar. The Invoice Report screen appears.

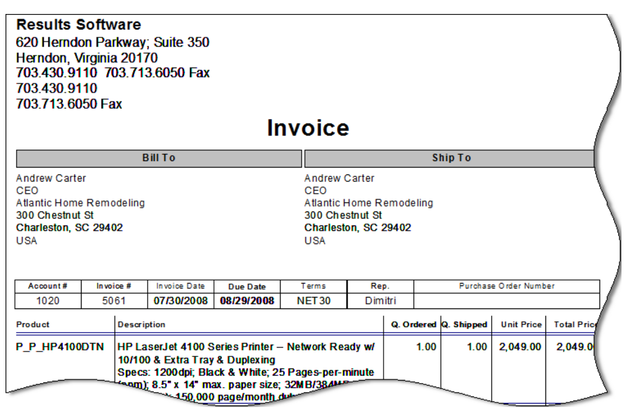
Figure 125: Invoice Reports Screen



4. Highlight the preferred layout for your invoice.

5. Click the **Print** button on the toolbar.

Figure 126: Printed Invoice



Results Software
620 Herndon Parkway; Suite 350
Herndon, Virginia 20170
703.430.9110 703.713.6050 Fax
703.430.9110
703.713.6050 Fax

Invoice

Bill To	Ship To
Andrew Carter CEO Atlantic Home Remodeling 300 Chestnut St Charleston, SC 29402 USA	Andrew Carter CEO Atlantic Home Remodeling 300 Chestnut St Charleston, SC 29402 USA

Account #	Invoice #	Invoice Date	Due Date	Terms	Rep.	Purchase Order Number
1020	5061	07/30/2008	08/29/2008	NET 30	Dimitri	

Product	Description	Q. Ordered	Q. Shipped	Unit Price	Total Pric
P_P_HP4100DTN	HP LaserJet 4100 Series Printer – Network Ready w/ 10/100 & Extra Tray & Duplexing Specs: 1200dpi; Black & White; 25 Pages-per-minute (ppm); 8.5" x 14" max. paper size; 32MB/384M... ...150,000 page/month du...	1.00	1.00	2,049.00	2,049.0

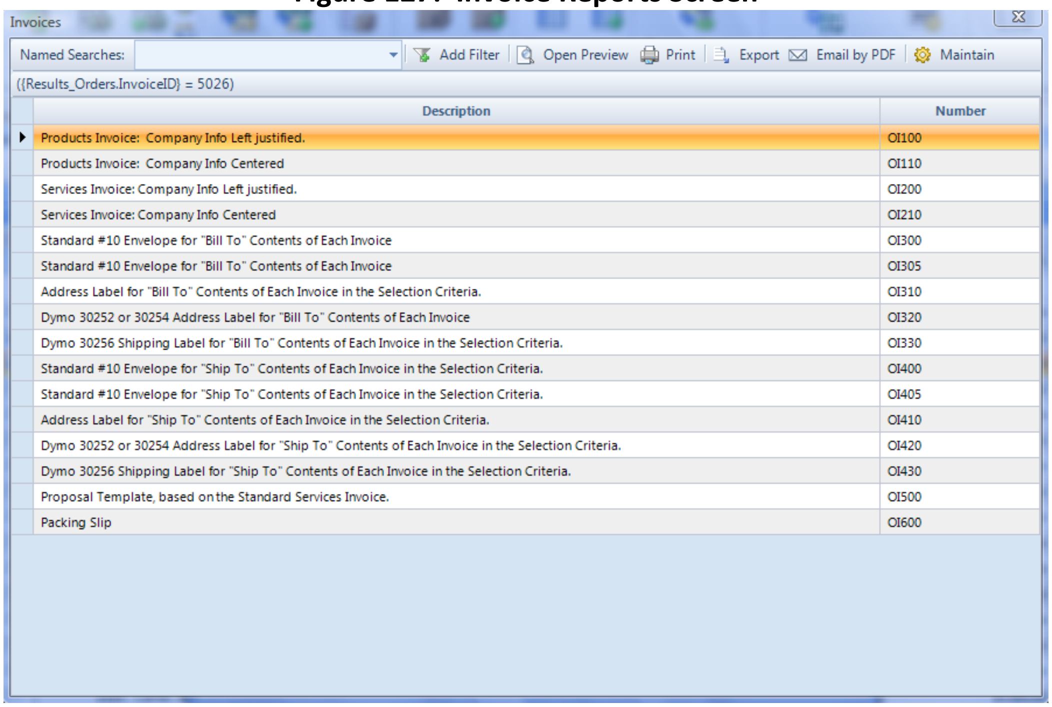
How to Email an Invoice:

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoice Data Management Center** will appear.

2. Double-click on the Invoice you would like to open.

3. Click the **Print or Email** button that appears on the upper toolbar. The **Invoice Reports** screen appears.

Figure 127: Invoice Reports Screen



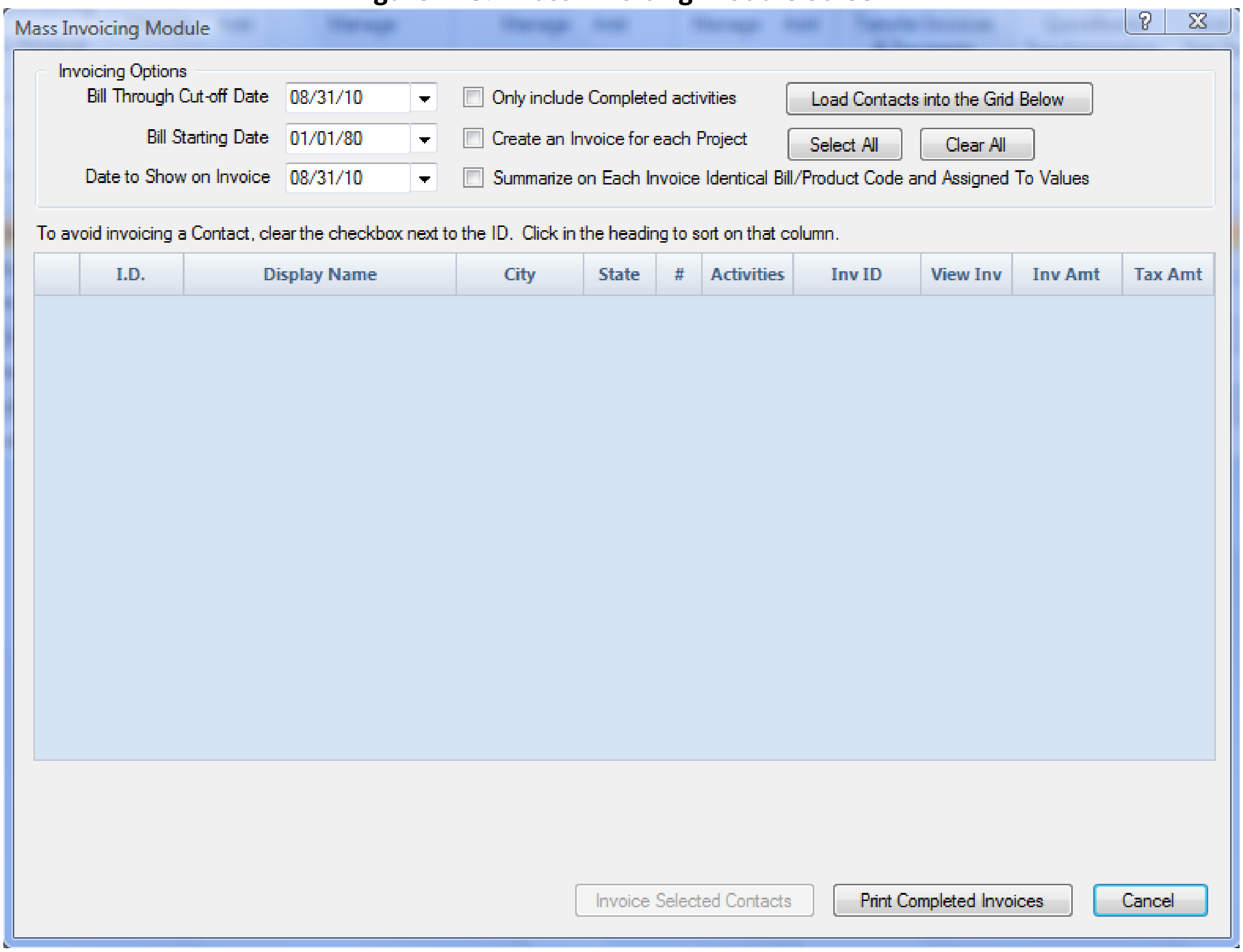
4. Highlight the preferred layout for your invoice.

5. Click the **Email by PDF** button on the toolbar. An email will open with an attached PDF file of the invoice. The email will be addressed to the Primary Contact, the Bill To Associate (if different), and the Ship To Associate (if different). **Note:** Refer to *How to Change Configuration and Set Up Options*, to customize the contents of the email message.

How to Mass Invoice:

1. On the **Finances** tab, in the **Invoices** group, click **Mass Invoicing**. The **Mass Invoicing Module** screen will appear.

Figure 128: Mass Invoicing Module Screen



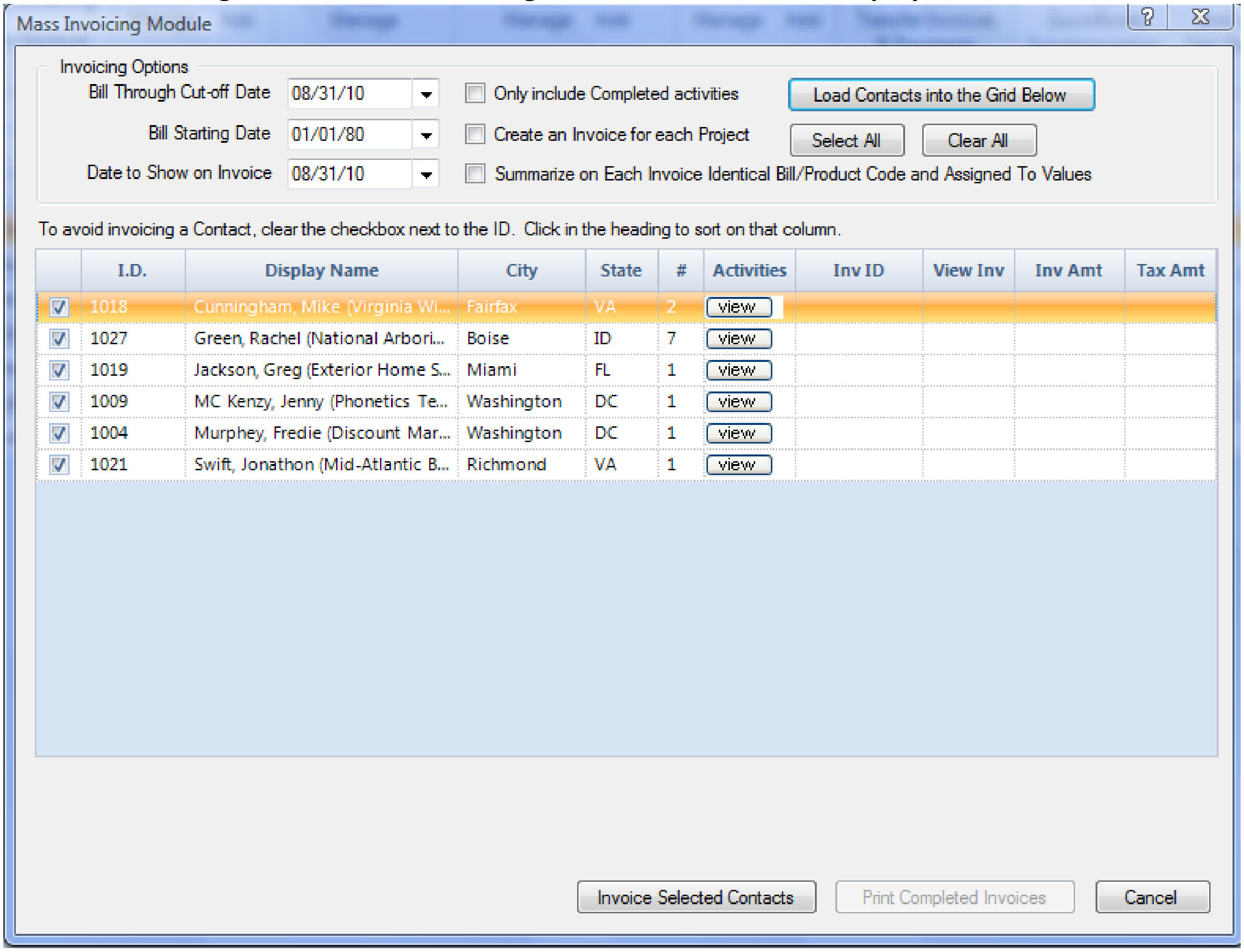
2. Filter your search criteria by selecting the appropriate dates for the following fields:
   a. **Bill Through Cut-off Date**
   b. **Bill Starting Date**

3. Enter the date you would like to appear on the invoice in the **Date to Show on Invoice** field.

4. Select the other options on the top portion of the screen as appropriate for your company.

5. Click the **Load Contacts into the Grid Below** button. All contacts that have completed billable activities will appear in the grid.

Figure 129: Mass Invoicing Module with Contacts Displayed in Grid



6. To view the activities before the invoice is created, push the **View** button associated with each record.

7. If you do not want to invoice a particular contact, uncheck the box in the first column of the grid that is associated with that record.

8. Press the **Invoice Selected Contacts** button. You will notice the **Invoice ID**, **Invoice Amount** and **Tax Amount** columns of the selected records will now be populated.

9. To preview any of the invoices, push the **View** button associated with the record.

10. Press the **Print Completed Invoices**.

How to Copy or Duplicate an Existing Invoice

1. On the **Finances** tab, in the **Invoices** group, click **Manage**. The **Invoice Data Management Center** will appear.

2. Double-click on the Invoice you would like to open.

3. Click the **Duplicate** button that appears on the upper toolbar of the **Invoice** screen.

4. Click the **Yes** button to confirm that you would like to duplicate the Invoice.

5. A message will display the Invoice Number of the newly created record. To open the new Invoice, use the Invoice DMC to search for the new Invoice number.

Payments

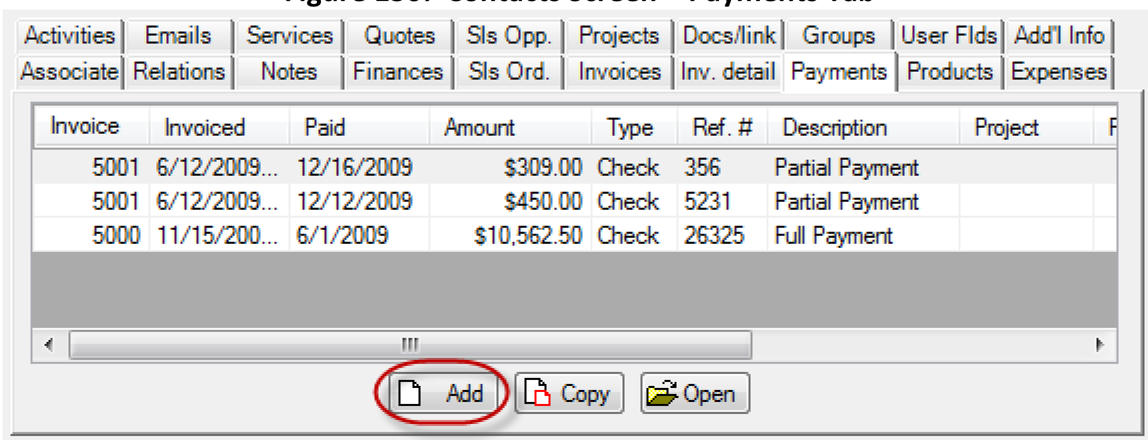
To Apply a Payment

From the Contacts Screen

1. From the **Contacts** Screen, navigate to the **Payments** tab.

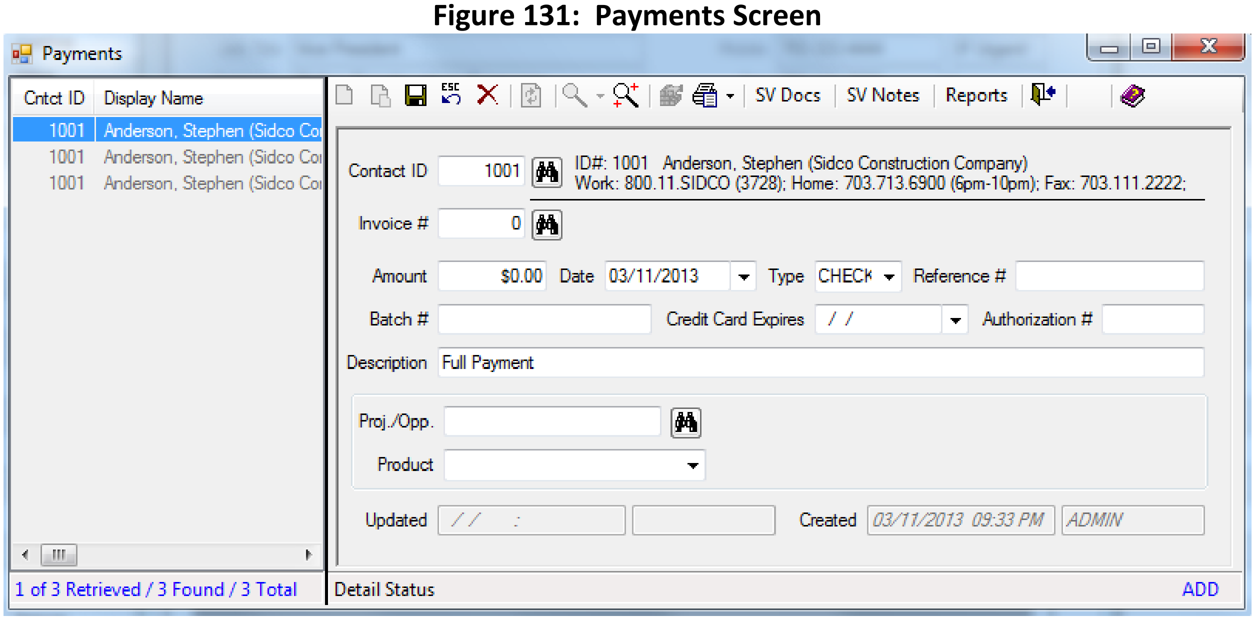
2. Click the **Add** button.

Figure 130: Contacts Screen – Payments Tab



3. The Payments screen will display. The Contact ID will be populated.

Figure 131: Payments Screen



4. Type in the **Invoice #** or click the search (binocular) icon to browse invoices associated with this contact.

5. Enter the payment **Amount, Date** and **Type.**

6. Enter information for the **Reference #, Batch #, Credit Card Expires,** and **Authorization #** fields as necessary.

7. If necessary, modify the **Description.**

8. Click the save icon to save the Payment information.

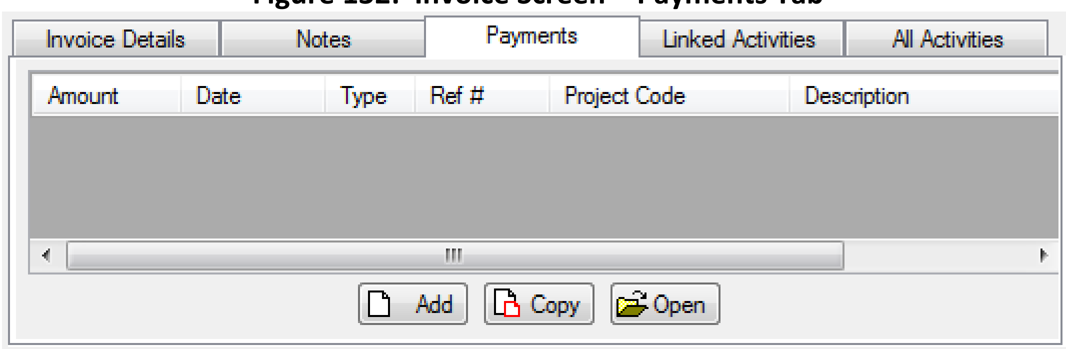
9. To add another payment, click the Add icon and repeat Steps 4-8. Otherwise, close the screen to return to the Contact screen.

From the Invoice Screen

1. From the **Invoice** Screen, navigate to the **Payments** tab.

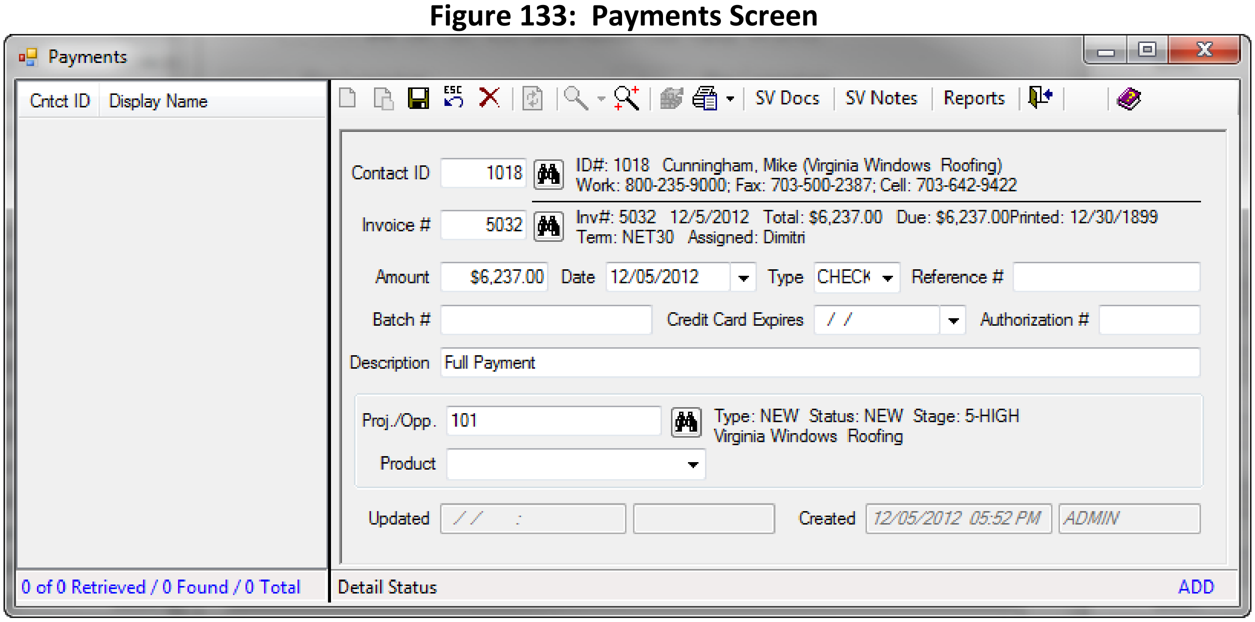
2. Click the **Add** button.

Figure 132: Invoice Screen – Payments Tab



3. The Payments screen will display. The **Contact ID** and **Invoice #** will be populated.

Figure 133: Payments Screen



4. Enter the appropriate payment **Amount, Date** and **Type.**

5. Enter information for the **Reference #, Batch #, Credit Card Expires,** and **Authorization #** fields as necessary.

6. If necessary, modify the **Description.**

7. Click the icon to save the Payment information.

8. To add another payment, click the icon and repeat Steps 4-7. Otherwise, close the screen to return to the Invoice screen.

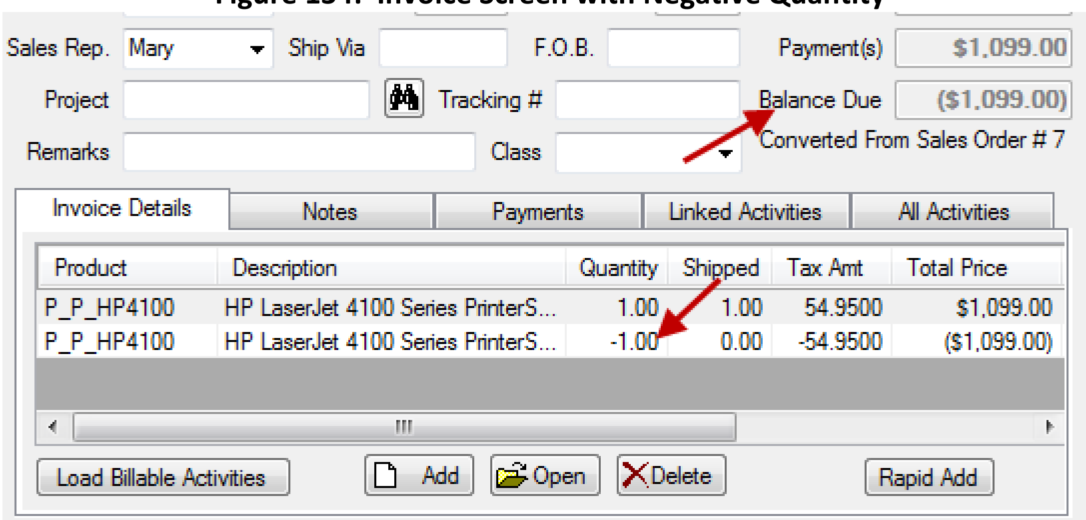
How to Apply a Credit to an Invoice

1. From the **Invoices** screen, click the **Add** button on the **Invoice Details** tab.

2. Add a line item with a negative quantity.

   Example: If you sold quantity 100 of "TILE01" and quantity 50 were returned, an additional line item will be added to the original invoice reflecting product "TILE01" with a quantity of -50. This will generate a "credit" on the invoice, reducing the Balance Due on the invoice.

Figure 134: Invoice Screen with Negative Quantity



3. Click the icon to save your changes. Close the Product Line Items screen.

4. On the Invoice screen, navigate to the Payments tab and click the **Add** button.

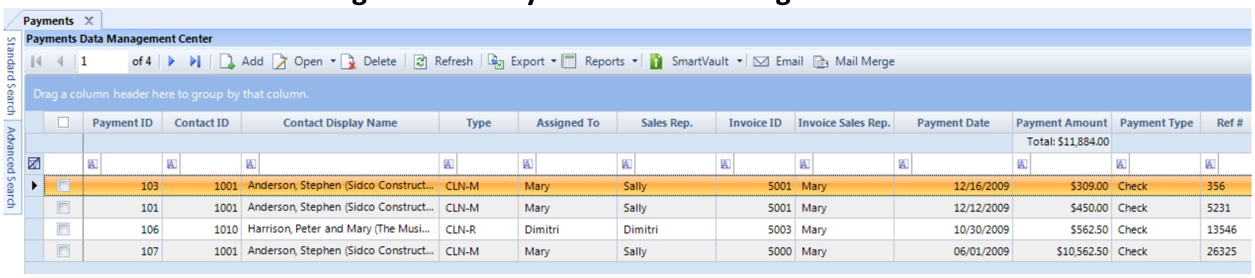
5. Create a negative payment equal to the credit amount. (Refer to the Payment Module for specific instructions on applying payments).

How to Open an Existing Payment

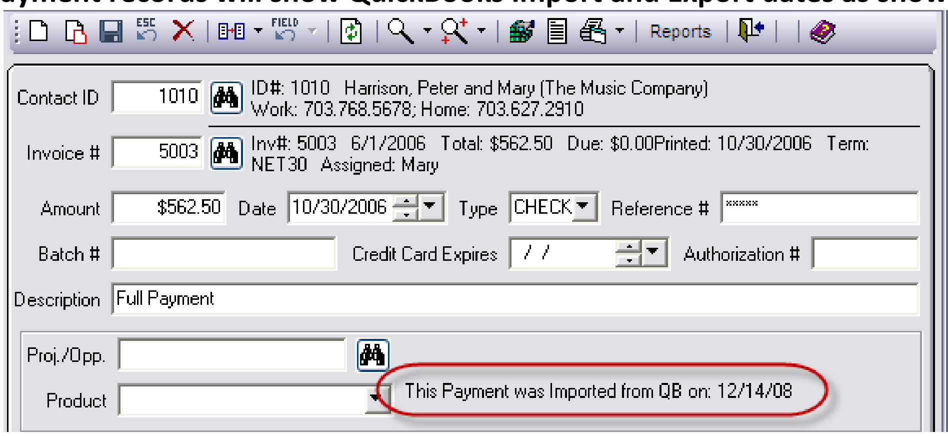
1. On the **Finances** tab, in the **Payments** group, click on **Manage**. The **Payments Data Management Center** will appear.

2. Conduct a search. Double-click on the Payment you would like to open.

Figure 135: Payments Data Management Center



Note: Payment records will show QuickBooks Import and Export dates as shown below:



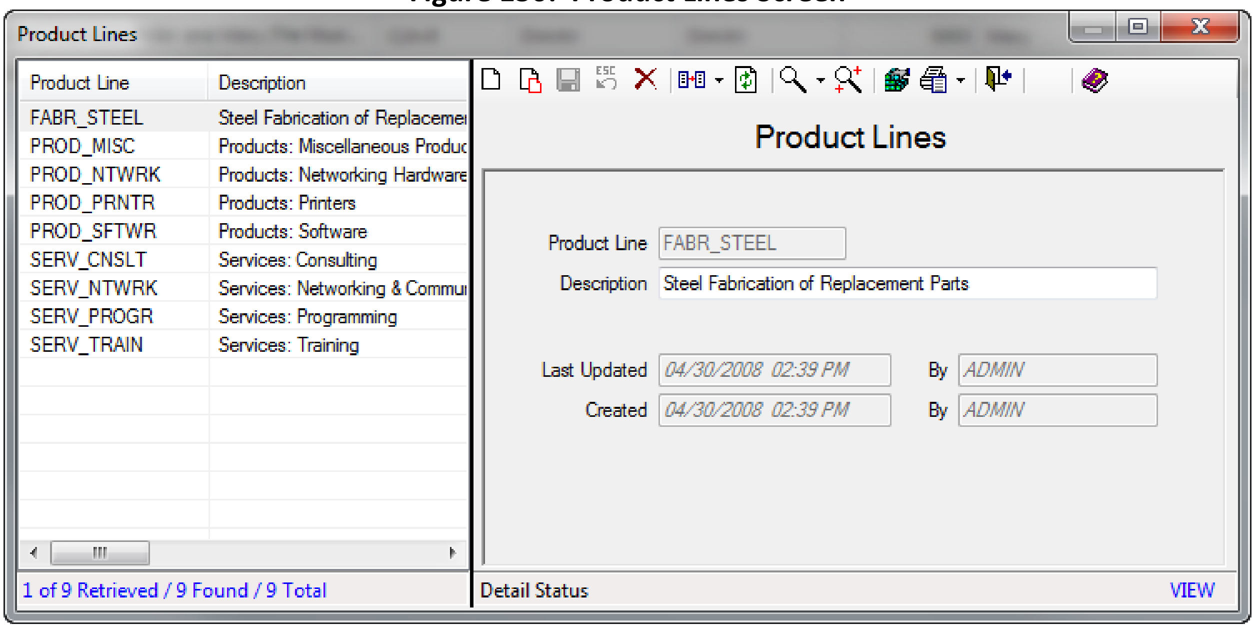
Products & Pricing

How to Add a Product Line:

1. On the **Setup** tab, in the **Maintain Lookup Values** group, click **Finances** and then select **Product Lines**.

2. Click the **Add** icon to add a new entry.

Figure 136: Product Lines Screen



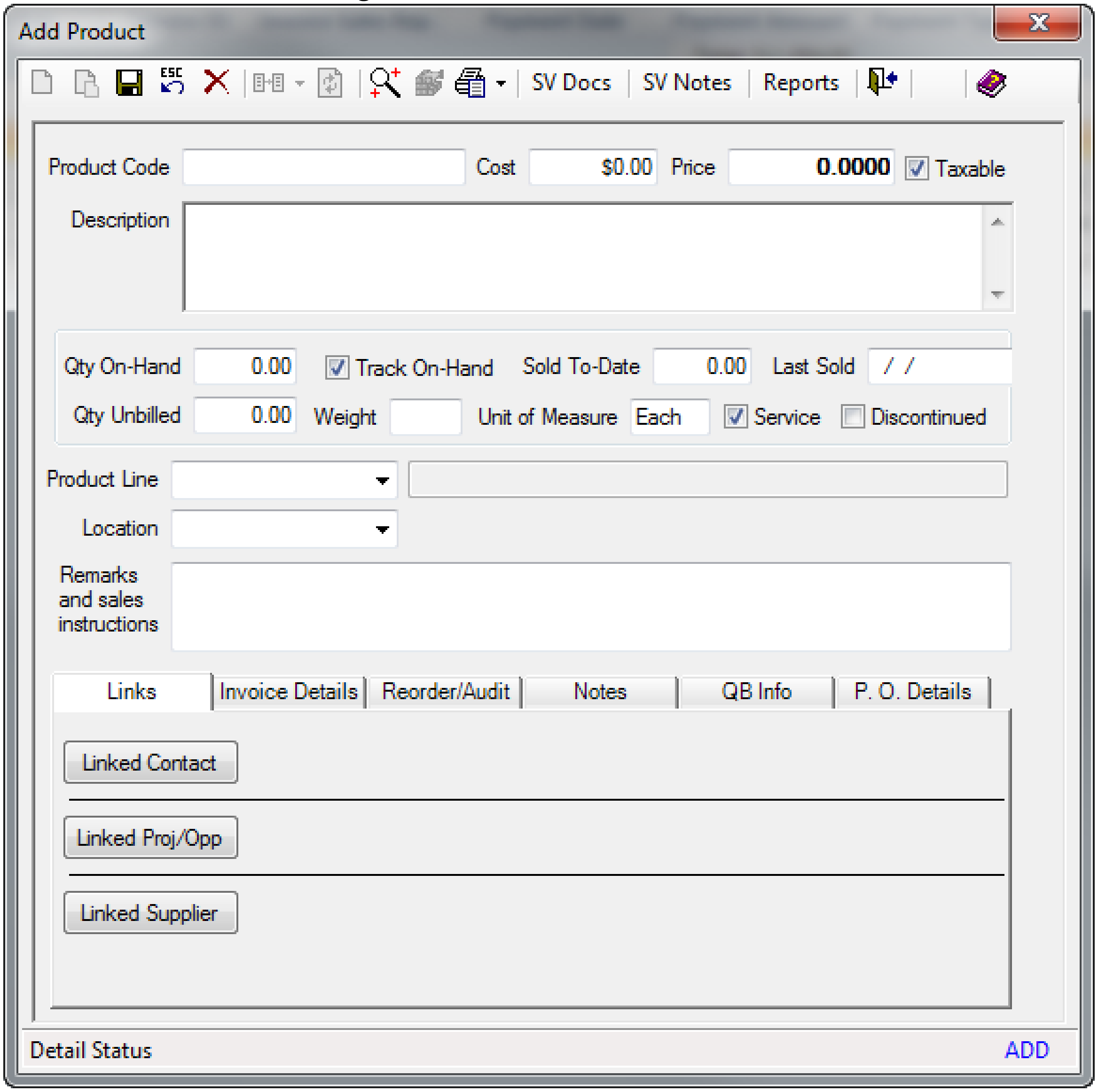
3. Fill out the **Product Line** and **Description** fields.

3. Click the **Save** icon to save the record.

How to Add a Product:

1. On the **Finances** tab, in the **Products & Pricing** group, click **Add**. The **Add a Product** screen will display.

Figure 137: Add a Product Screen



2. Enter a **Product Code** for the product. **Note:** This will appear on all invoices and quotes.

3. Enter the appropriate information in the rest of the screen.

4. The **Links** tab provides an area to associate the product with specific contacts, projects, sales opportunities or suppliers. To link the product with any or all of these categories, click the appropriate button, conduct a search for the record, and double-click the record you would like to link back to the product.

5. The Invoice Details tab that will list the corresponding Invoice Line Items where a Product has already been sold. It also displays the actual sales price.

 www.Results-Software.com

6. The Reorder/Audit tab provides an area to keep detailed information on the reorder levels, amounts and associated dates. Fill out information on this tab as appropriate.

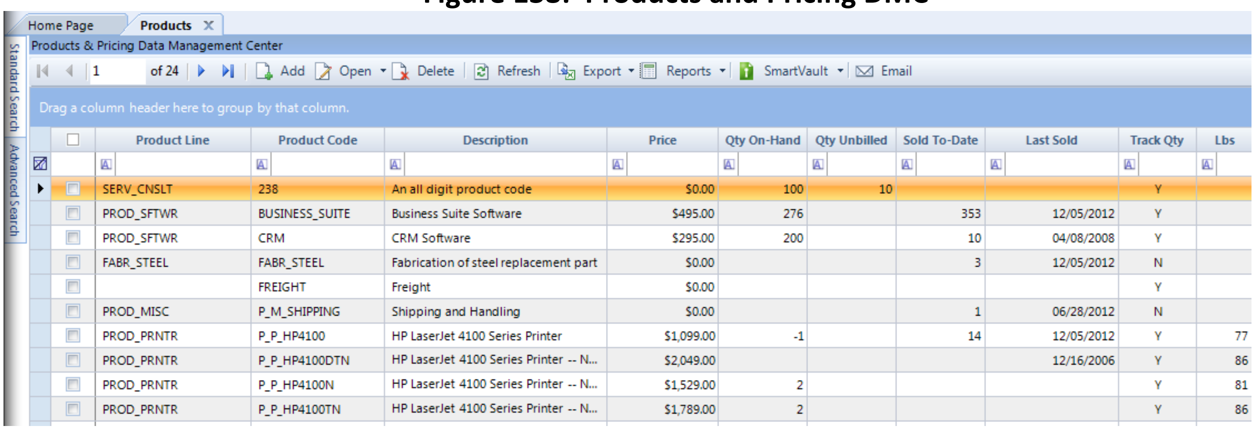
7. The Notes tab provides an unlimited text field to store additional notes on the product. Fill out this tab as appropriate.

8. Click the **Save** icon to save the record.

How to Open an Existing Product

1. On the **Finances** tab, in the **Product & Pricing** group, select **Management**. The **Product & Pricing Data Management Center** will appear.

Figure 138: Products and Pricing DMC



2. To filter your search, do one of the following:

   - Click on the **Standard Search** tab, enter search criteria and click **Apply**.
   - Use the column filtering feature.

3. A list of records meeting your search criteria will appear. Double-click on the record you would like to open.

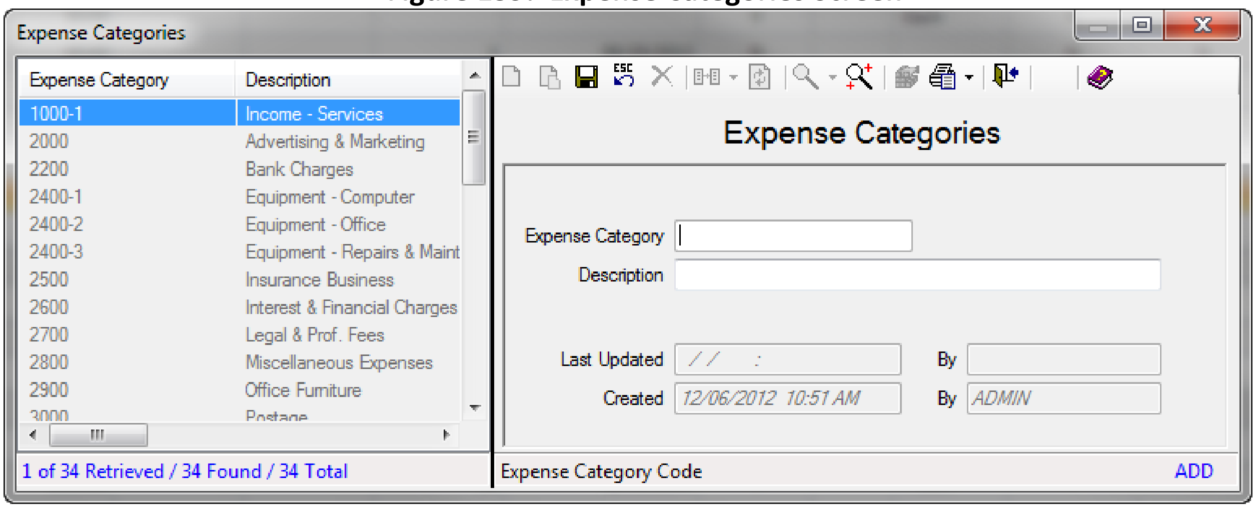
Expenses

How to Add an Expense Category

1. On the **Setup** tab, in the **Maintain Lookup Values** group, click **Finances** and then select **Expense Categories**.

2. Click the **Add** icon to add a new entry.

Figure 139: Expense Categories Screen



3. Fill out the **Expense Category** and **Description** fields.

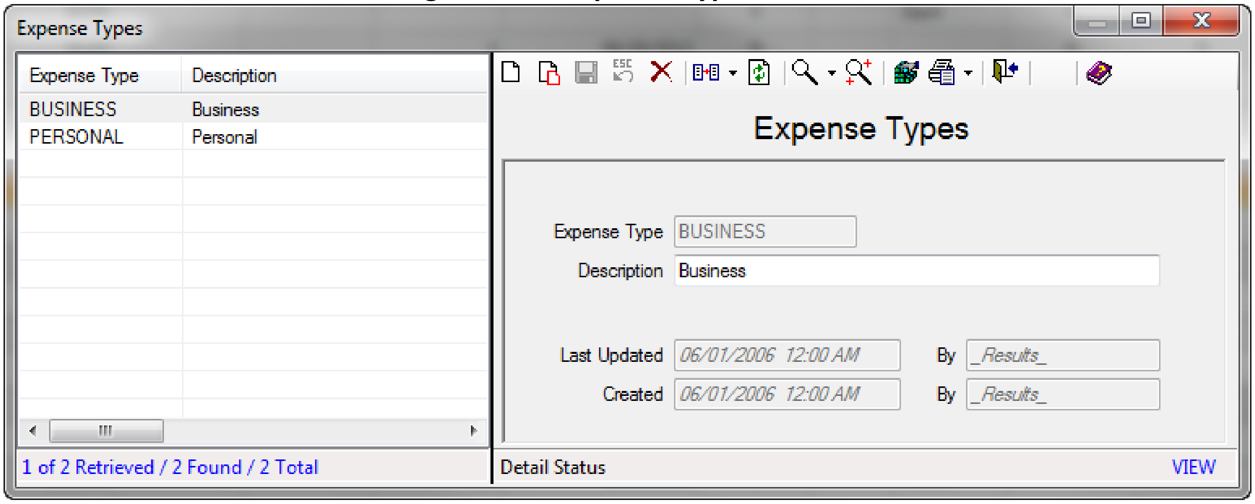
a. Click the **Save** icon to save the record.

How to Add an Expense Type

1. On the **Setup** tab, in the **Maintain Lookup Values** group, click **Finances** and then select **Expense Type**.

2. Click the **Add** icon to add a new entry.

Figure 140: Expense Types Screen



3. Fill out the **Expense Type** and **Description** fields.

4. Click the **Save** icon to save the record.

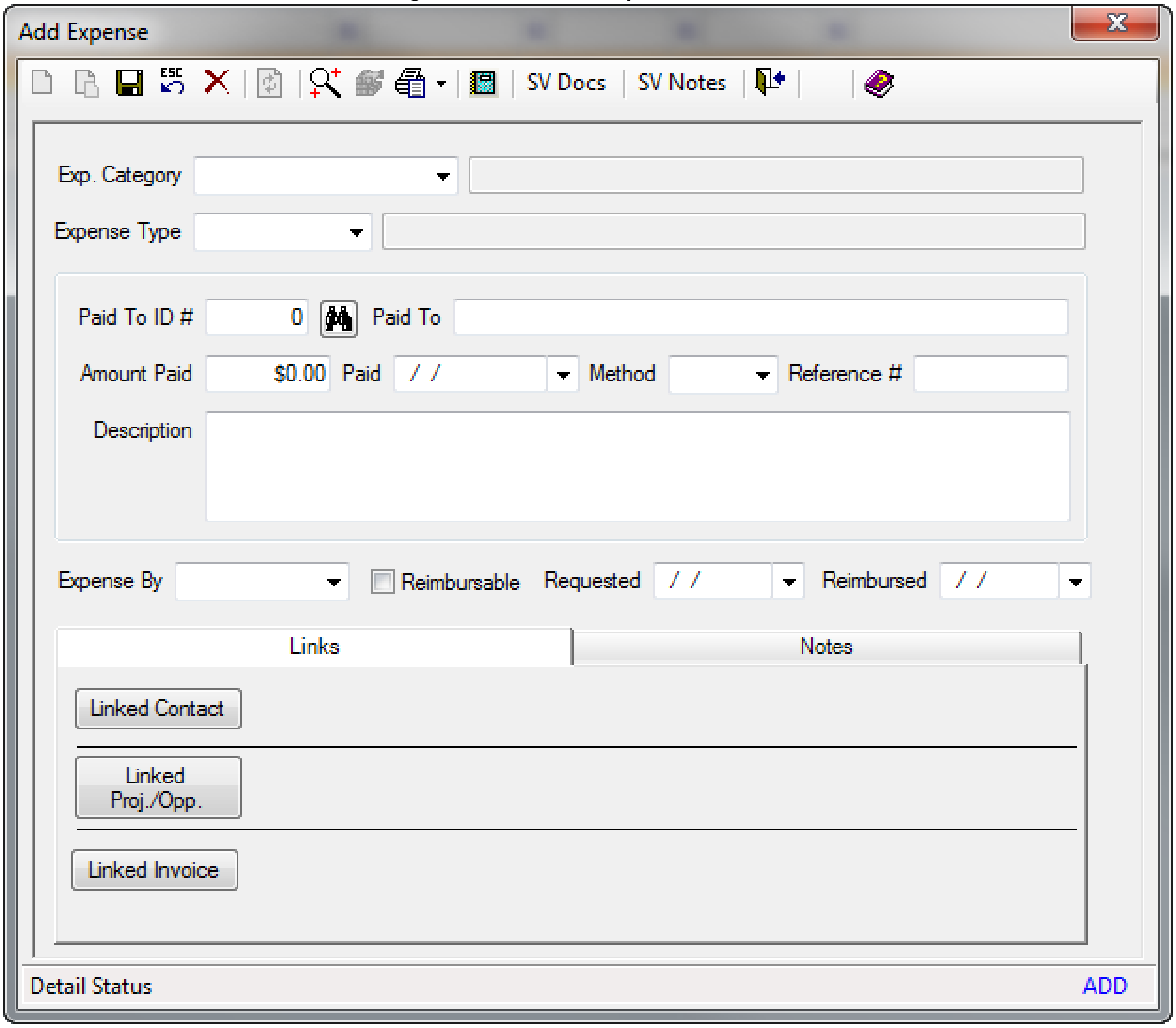
How to Add an Expense

From the Expense Data Management Center

1. On the **Finances** tab, in the **Expenses** group, click **Manage**. The **Expense DMC** will open.

2. Click the **Add** button on the DMC toolbar. The **Add Expense** screen appears.

Figure 141: Add Expense Screen



3. Select an **Expense Category** and **Expense Type**.

4. If the expense is associated with a Results Contact, enter the **Contact ID** or click the binocular icon to search for the contact. If a Contact ID is selected, the **Paid To** field will be automatically populated.

5. If not previously populated, fill out the **Paid To** field.

6. Enter appropriate information into the **Amount Paid, Paid** (Date)**, Method, Reference #** (optional) and **Description** fields.

7. Fill out information on the rest of the screen as appropriate.

8. The Links tab provides an area to associate the expense with specific contacts, projects, sales opportunities or invoices. To link the product with any or all of these categories, click

the appropriate button, conduct a search for the record, and double-click the record you would like to link back to the product.

9. The Notes tab provides an unlimited text field to store additional notes about the expense. Fill out this tab as appropriate.

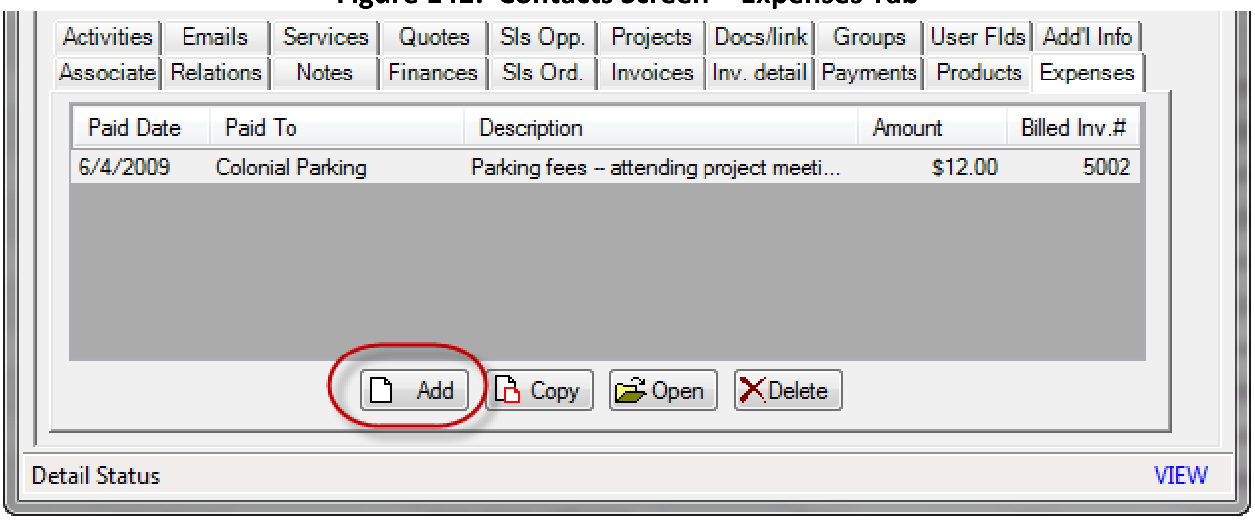
10. Click the **Save** icon to save the record.

From the Contact Screen

1. From the Contact Record, navigate to the **Expenses** tab. (refer to *How to Open an Existing Contact Record*.)

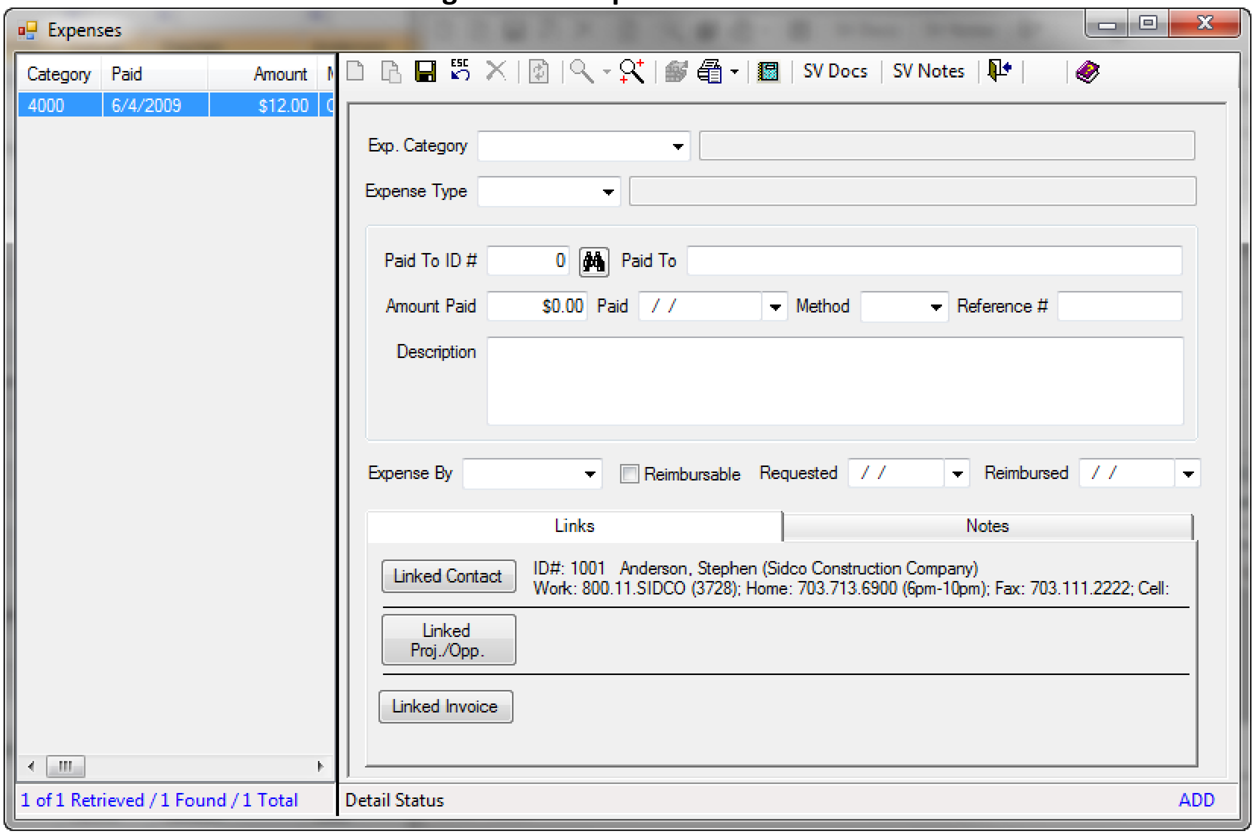
2. Select the **Add** button under the **Expenses** tab.

Figure 142: Contacts Screen – Expenses Tab



3. The **Expense** screen appears.

Figure 143: Expense Screen



4. Select an **Expense Category** and **Expense Type**.

5. If the expense was paid to a Results Contact, enter the **Contact ID** or click the binocular icon to search for the contact. If a Contact ID is selected, the **Paid To** field will be automatically populated.

6. If not previously populated, fill out the **Paid To** field.

7. Enter appropriate information into the **Amount Paid, Paid** (Date)**, Method, Reference #** (optional) and **Description** fields.

8. Fill out information on the rest of the screen as appropriate.

9. The Links tab provides an area to associate the expense with specific contacts, projects or invoices. The Link Contact will be automatically populated. To link the Expense with a Project or Invoice, click the appropriate button, conduct a search for the record, and double click the record you would like to link back to the product.

10. The Notes tab provides an unlimited text field to store additional notes about the expense. Fill out this tab as appropriate.

11. Click the Save icon to save the record.

How to Open an Existing Expense

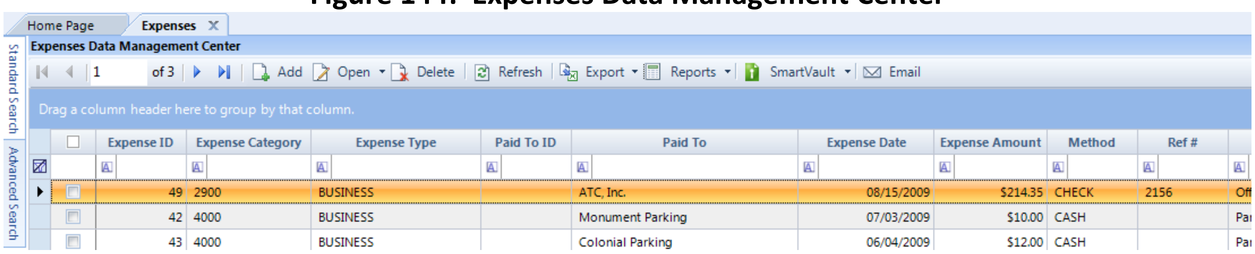
1. On the **Finances** tab, in the **Expense** group, click **Manage**. The **Expenses Data Management Center** will appear.

2. To filter your search, do one of the following:

   - Click on the **Standard Search** tab, enter search criteria and click **Apply**.
   - Use the column filtering feature.

3. A list of records meeting your search criteria will appear. Double-click on the record you would like to open.

Figure 144: Expenses Data Management Center



Timesheets

How to Change Timesheet Configuration and Security

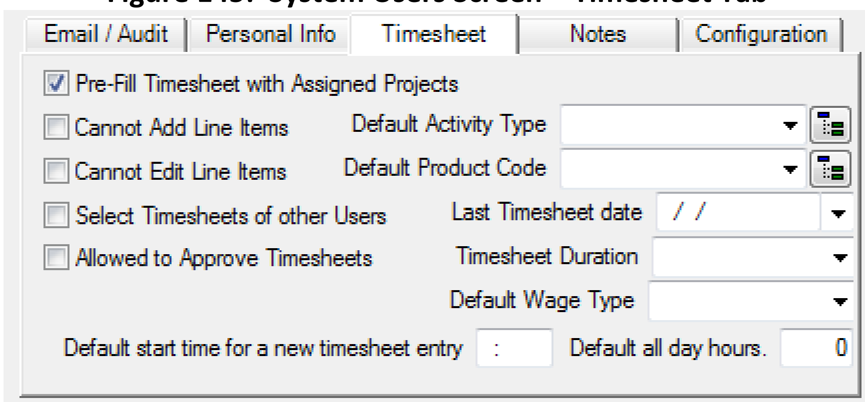
1. On the **Setup** tab, in the **Security** group, click **Users.** **Note:** This option is only available to users with Administrative rights.

2. Select the desired User from the left hand grid.

3. Navigate to the **Timesheet** tab.

4. Change the timesheet settings as needed, for all users:

Figure 145: System Users Screen – Timesheet Tab



How to Add Time to Your Timesheet

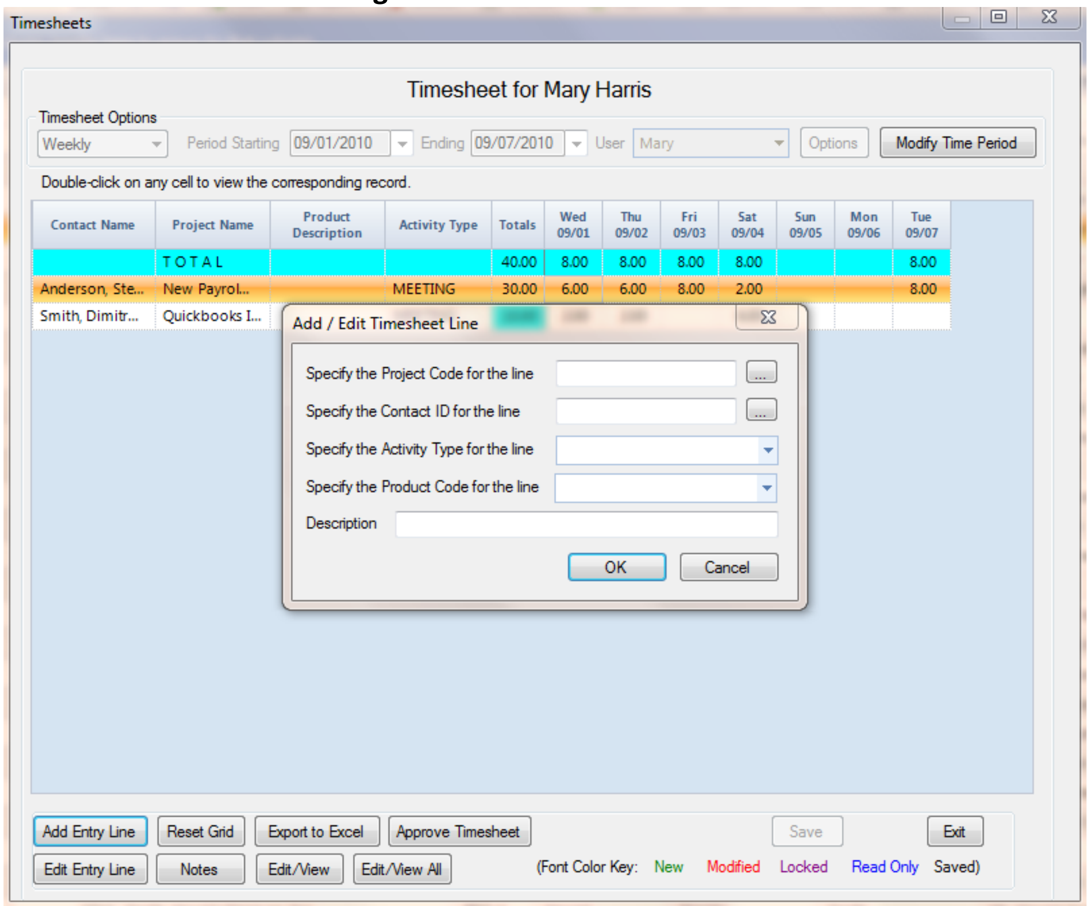
From the Timesheet Module

1. On the **Time & Expense** tab, in the **Time** group, click **Timesheets.**

2. Click the **Modify Time Period** button to change the displayed User or Time Period that is displayed. Click **Show Timesheet** to display the selected Timesheet screen.

3. If you need to add a new line item to your Timesheet, click the **Add Entry Line** button at the bottom of the page. The following screen displays:

Figure 146: Timesheets Screen



4. Add a **Project Code**, **Contact ID** and **Activity Type** for the Line Item you wish to add. If desired, select a **Product Code** and fill out a **Description**. Click **OK** to have the Line Item added to your timesheet.

5. Place your cursor in the field corresponding to the day and Contact or Project. Type in the number of hours.

6. Click the **Save** button. **Note:** When saved, entries that are Green (New) or Red (Modified) will become Black.

From an Activity

All completed activities will automatically display on the timesheet of the User that is identified in the **Assign To** field on the **Activity** screen.

Please refer to the Calendar & Activities chapter for more information on Activities.

How to Automatically Populate Your Timesheet

To pre-populate your timesheet, you can set up a series of recurring completed activities.

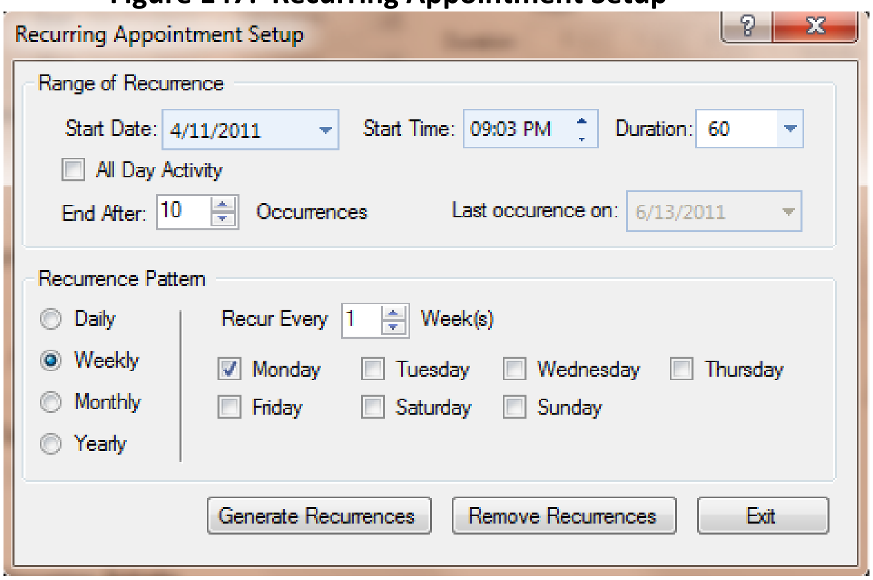
1. Navigate to the **Activity** screen and fill out the appropriate information. (Please refer to *Calendar & Scheduling* for more information on Activities.)

2. Mark the Activity as Complete by placing a checkmark in the **Completed** field.

3. Navigate to the **Calendar** tab and click the **Add / Edit Recurrence Options** button.

4. Fill out information regarding the recurring activity as appropriate:

Figure 147: Recurring Appointment Setup



5. Click the **Generate Recurrences** button.

6. Click the icon to save your changes.

7. The timesheet of the User identified in the **Assigned To** field will be populated with the recurring activities.

Purchase Orders

The Purchase Order module allows you to search for QuickBooks and Results Purchase Orders. Information can be viewed from within this DMC or exported to Excel.

How to Create a Purchase Order

In the current version of Results, Purchase Orders can only be created from within a Project.

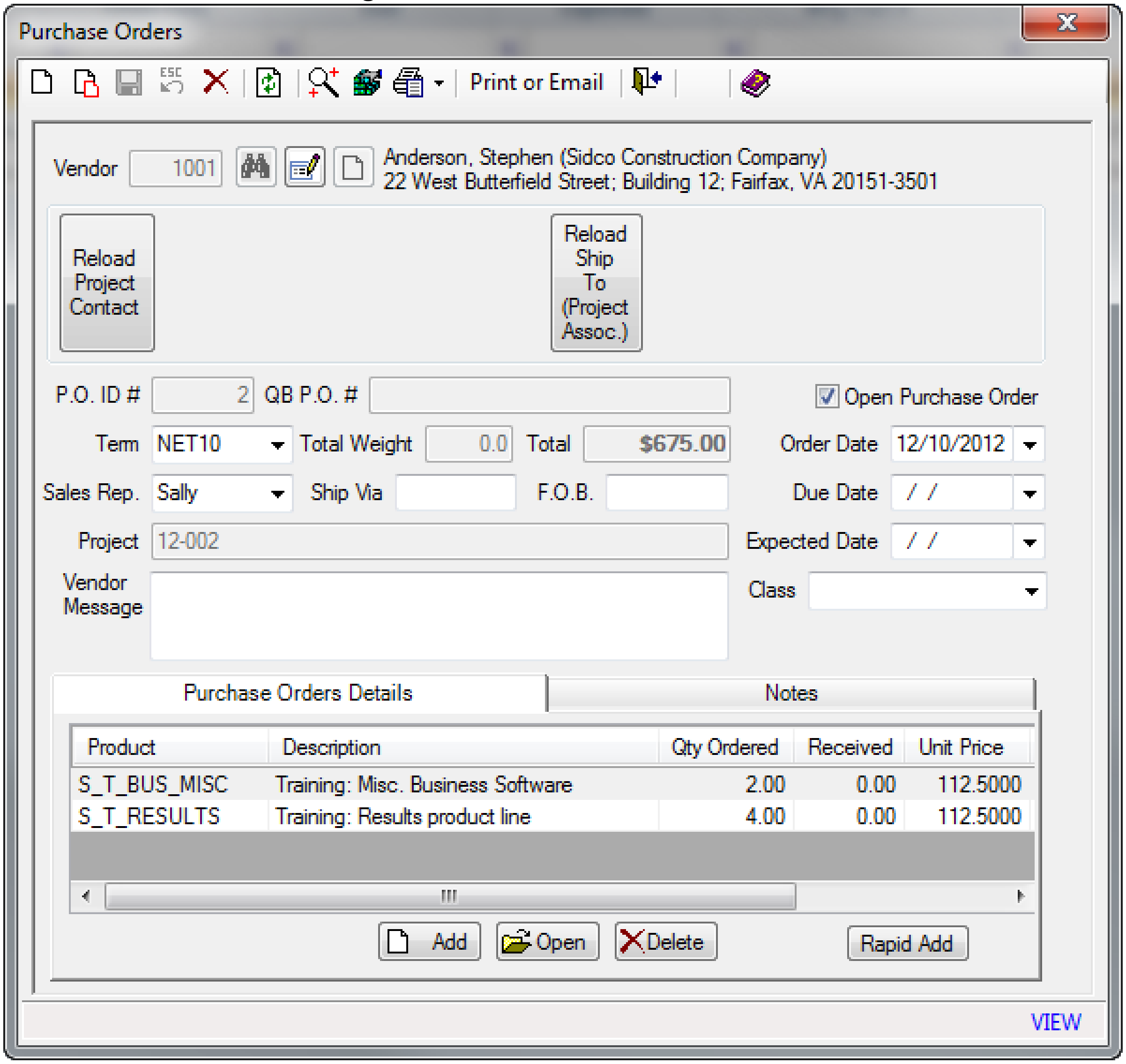
1. On the **Services & Projects** tab, in the **Projects & Contracts** group, click **Manage**. The **Projects Data Management Center** will appear.

2. Conduct a search. A list of projects meeting your search criteria will appear.

3. Double-click on the Project you would like to open.

4. Navigate to the **Purch. Ord. (**Purchase Orders) Tab and click **Add**. The Purchase Order screen will appear.

Figure 148: Purchase Orders Screen



5. Enter a Vendor's Contact ID. To search for an existing Contact, select a **Search** icon next to the Vendor field OR to add a new contact record, click the **New** icon next to the Vendor field.

6. The selected or added Vendor will automatically populate.

7. The **Project Contact** and **Ship To** addresses are automatically populated based on the selected Contact on the Project screen. To refresh the data displayed in either of these sections, click the respective buttons.

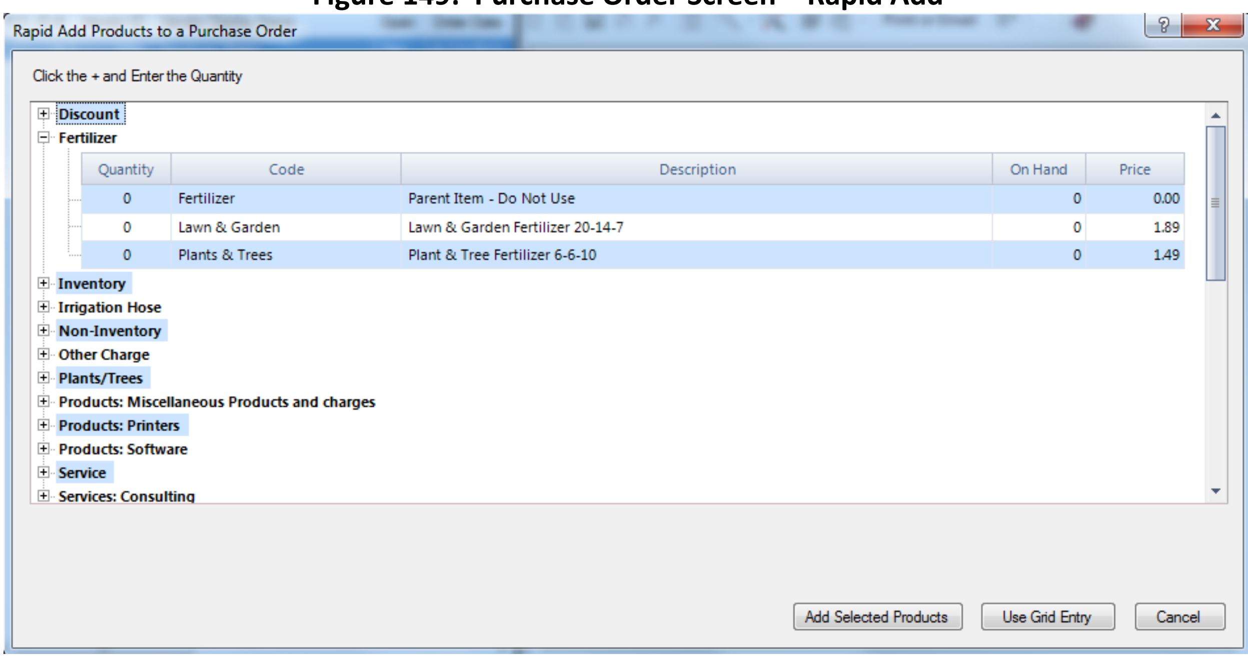
8. Fill in appropriate information on the top portion of the Purchase Order screen.

9. Click the icon to save the record. The buttons in the Purchase Order Detail part of the screen will now become available.

10. Choose one of the following ways to add line items to the quote:

    a. **Via Rapid Add:**
        i. Click the **Rapid Add** button and select the products you would like to appear on the quote. **Note:** The system will quickly find the desired product when you start typing the first letters of the product name.
        ii. Change the quantity of items displayed on the quote in the Qty column associated with the product you would like to add.
        iii. Click the **Add Selected Products** button. **Note:** To change the quantity or the price of any added item, highlight the item in the Purchase Order Details grid and click the Edit button.

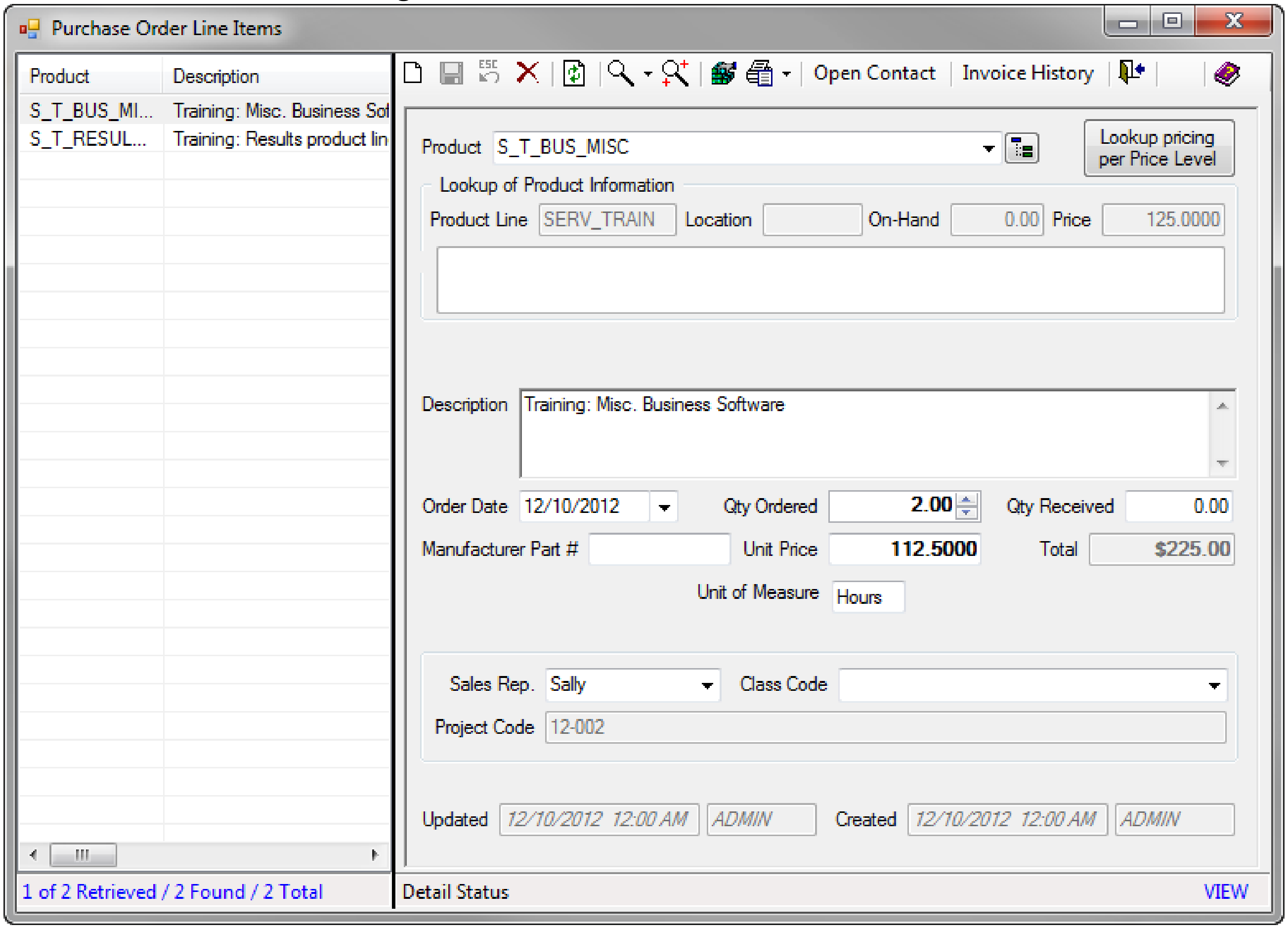
Figure 149: Purchase Order Screen – Rapid Add



Note: The **Use Grid Entry** button provides another way to enter data in a Grid View. Once data is entered on a screen, you cannot switch views as the button will be temporally grayed out.

    b. **Via the Add Button**:
        i. Click the **Add** button to open the Purchase Order Line Items screen.
        ii. Select a **Product** from the drop down and change other fields on the screen as necessary.
        iii. Click the icon to save the record. To add another line item, click the Add icon and repeat this step as necessary.
        iv. Close the screen when you have added all line items.

Figure 150: Purchase Order Items Screen



Note: Once a Product is selected, click the **Invoice History** button or the **Open Contact** button in the upper tool bar to view the sales history of the selected product. For more details, refer to "Viewing Product Sales History When Creating a Purchase Order".

11. When you are done adding line items, click the icon to save the Purchase Order.

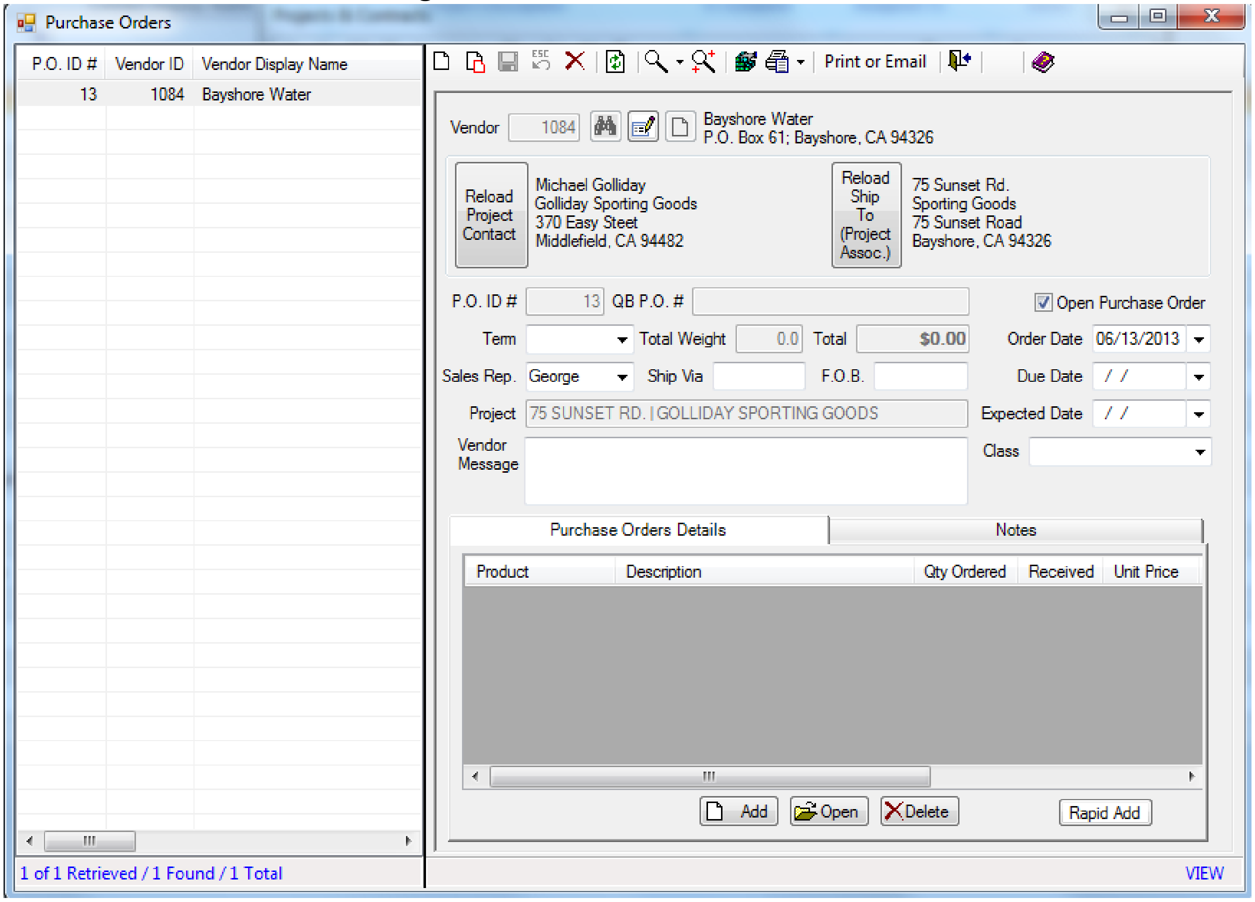
Viewing Product Sales History When Creating a Purchase Order

Viewing a product's sales history when creating a Purchase Order is helpful when you need to determine previous pricing, previous customers and other historical information about the Product.

1. On the **Finances** tab, in the **Purchase Orders** group, click **View**. The **QB Purchase Order Data Management Center** will appear.

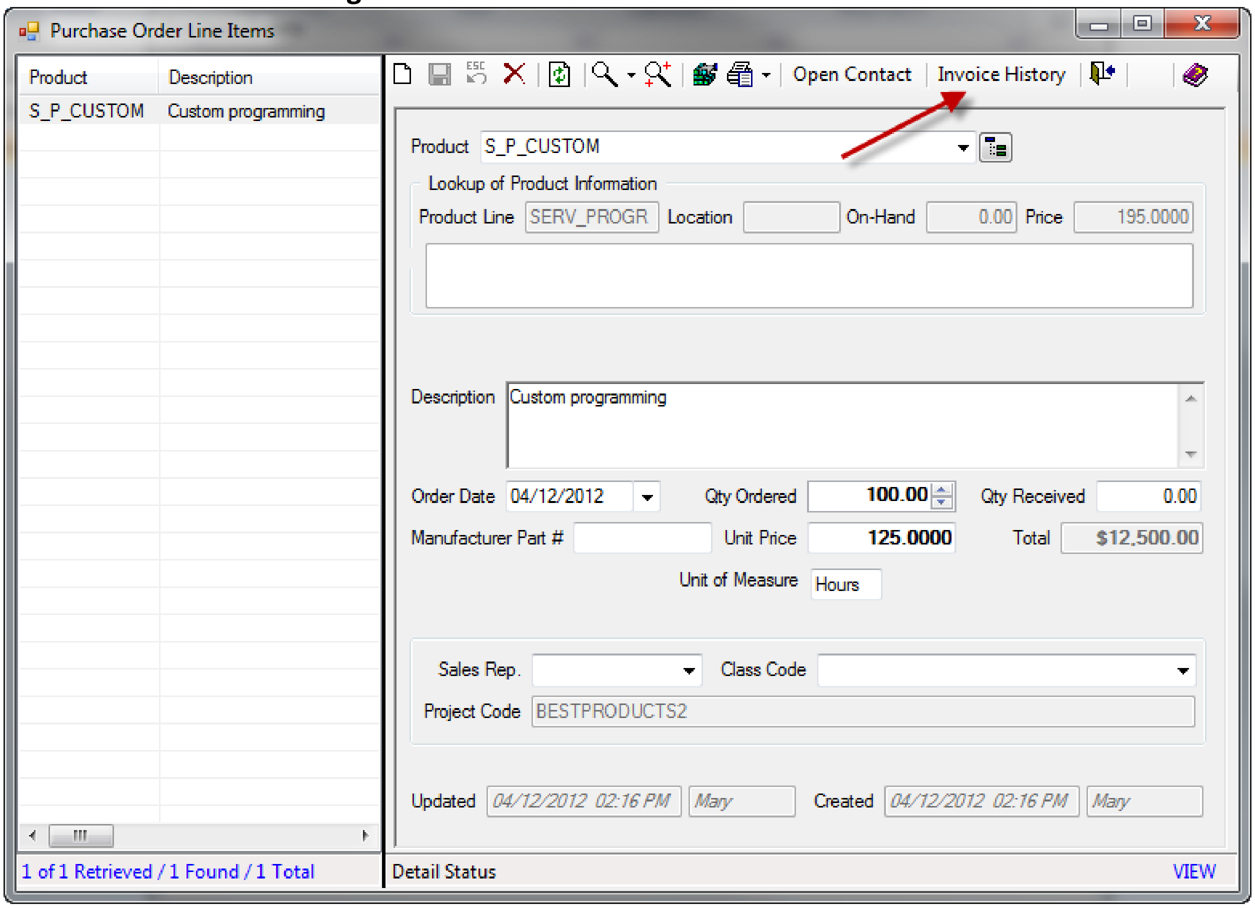
2. Double-click on the Purchase Order you would like to open. The Purchase Order screen appears.

Figure 151: Purchase Order Screen



3. Click on a **Purchase Order Line Item** from within the Purchase Order Details tab. The **Purchase Order Line Items** screen appears.

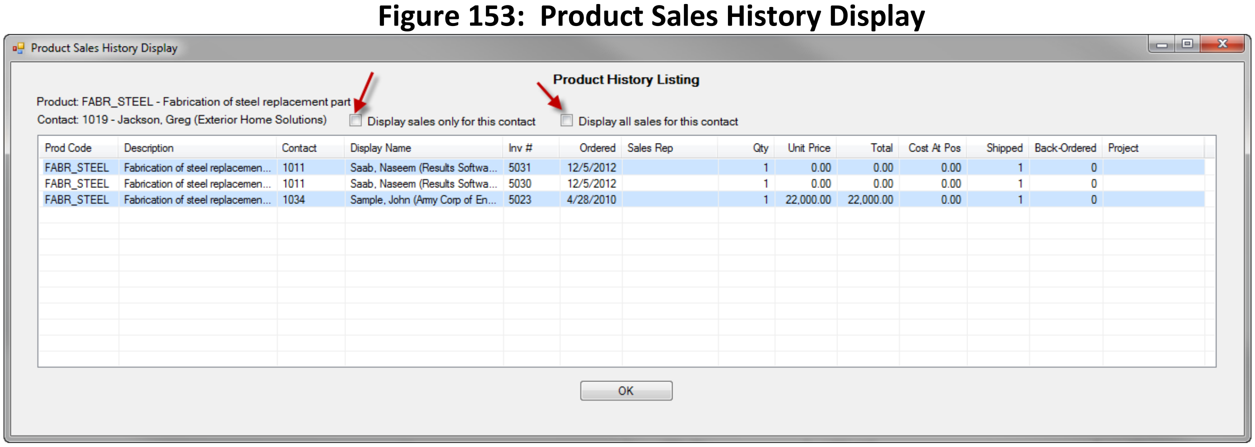
Figure 152: Purchase Order Line Items Screen



4. Select a **Product** from the Product drop-down list.

5. Once a product is selected, click the **Invoice History** button in the upper toolbar. The Product Sales History Display screen will appear.

Figure 153: Product Sales History Display



6. Click **OK** to close the screen and return to the Purchase Order Line Items screen.

Note: Alternatively, click the **Open Contact** button in the upper toolbar to view the Contact Record of the selected contact. Navigate to the Invoice Details Tab or the Invoices Tab to view Sales History for that contact.

How to Open an Existing Purchase Order

1. On the **Finances** tab, in the **Purchase Order** group, click **View**. The **Purchase Order Data Management Center** will appear.

2. Conduct a search. A list of purchase orders meeting your search criteria will appear.

3. Double-click on the Purchase Order you would like to open.

Note: To display Purchase Orders from QuickBooks, you must purchase the QuickBooks Integration option, configure QBI and synchronize data between Results and QuickBooks.

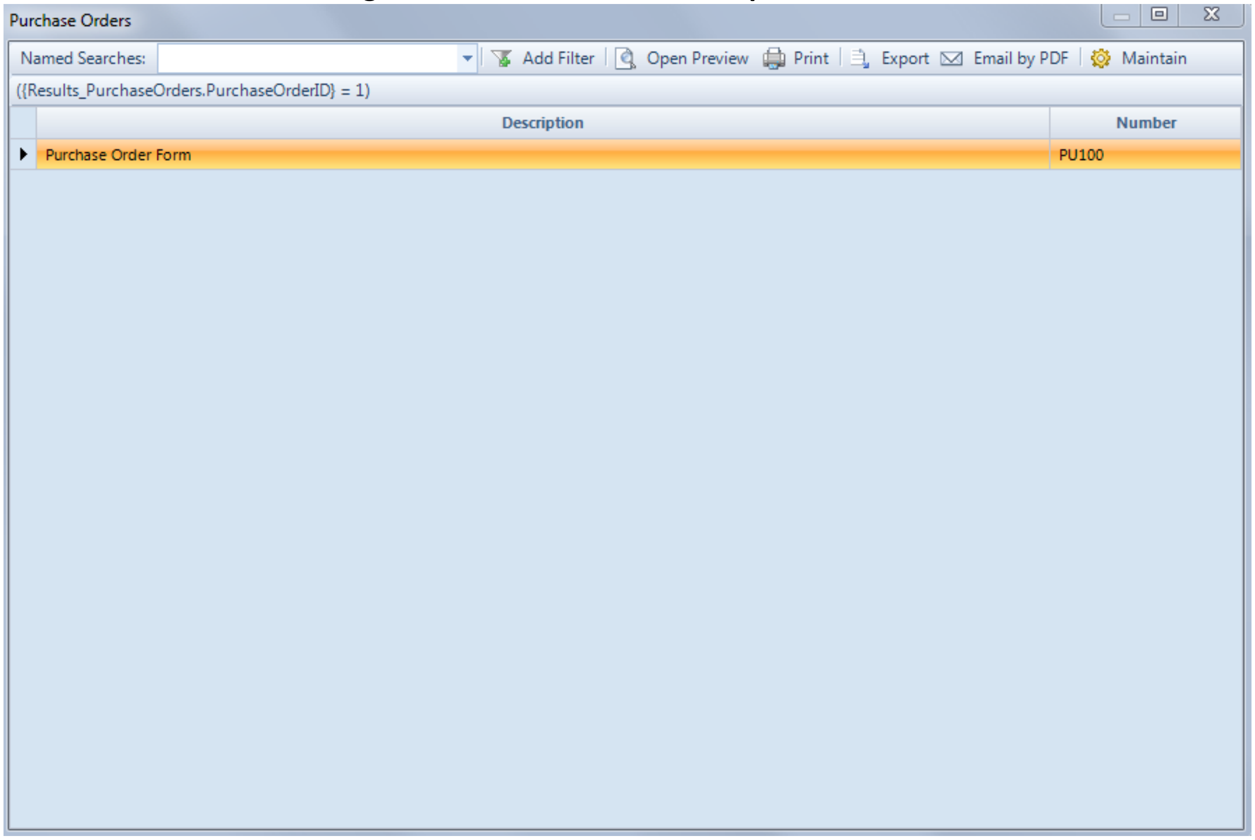
How to Print a Purchase Order

1. On the **Finances** tab, in the **Purchase Order** group, click **Manage.** The **Purchase Order Data Management Center** will appear.

2. Double-click on the Purchase Order you would like to open.

3. Click the **Print or Email** button that appears on the upper toolbar of the **Purchase Order** screen. The following screen appears:

Figure 154: Purchase Order Reports Screen



4. Highlight the preferred layout for your quote.

5. Click the **Print** button at the top of the screen.

Figure 155: Purchase Order Report

Results Software
620 Herndon Parkway, Suite 350
Herndon, VA 20170
800-703-7013

Purchase Order

Vendor	Vendor Message
Peter and Mary Harrison Owners The Music Store 1427 Washington Blvd Arlington, VA 22216 USA Work: 703.768.5678 ; Home: 703.627.2910	

Client/Customer	Ship To
Dr. Ronald Peterson VP Business Development BestProducts 6671 Hollow Road, Suite 210 Springfield, VA 22050 USA	Dr. Ronald Peterson VP Business Development BestProducts 6671 Hollow Road, Suite 210 Springfield, VA 22050 USA

Vendor Acct #	Purchase Order #	Order Date	Due Date	Expected Date	Terms	Ship Via	FOB

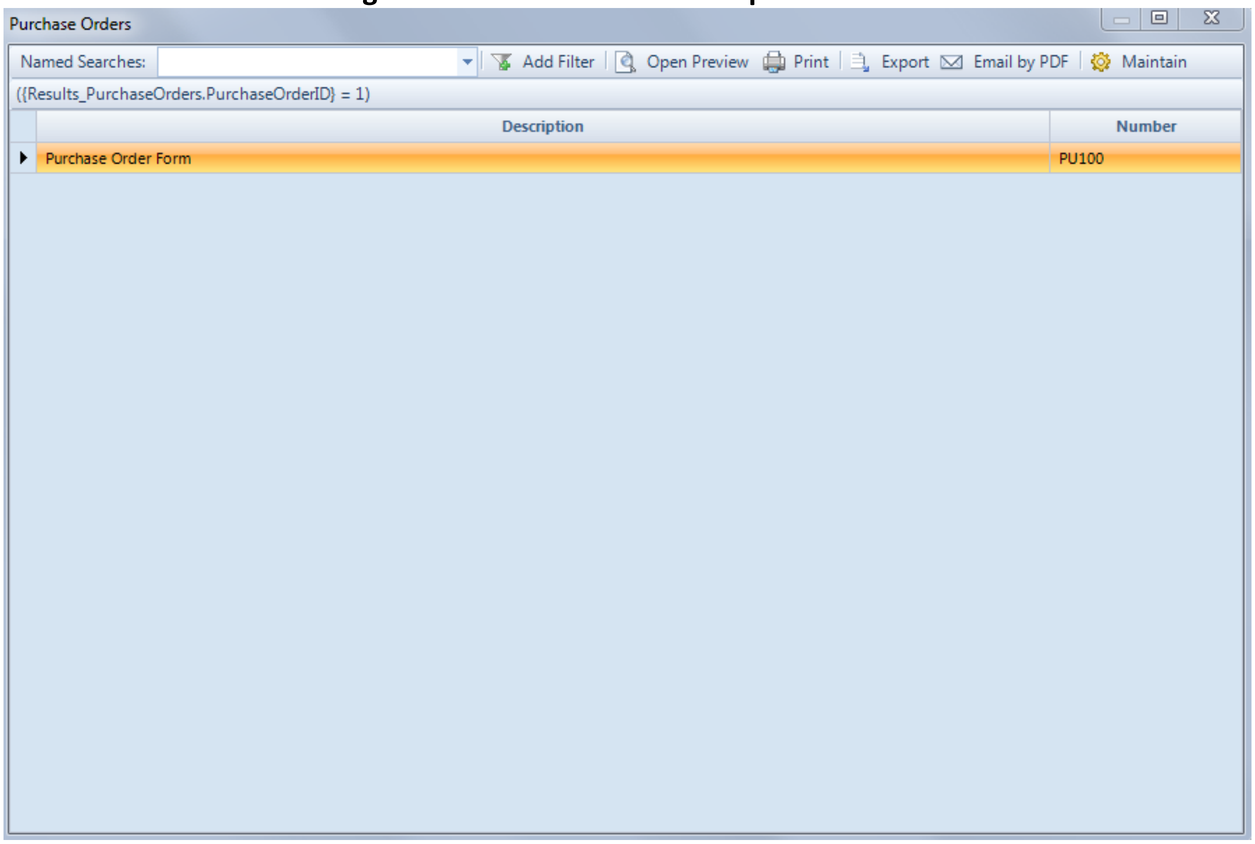
How to Email a Purchase Order

1. On the **Finances** tab, in the **Purchase Order** group, click **View**. The **Purchase Order Data Management Center** will appear.

2. Double-click on the Purchase Order you would like to open.

3. Click the **Print or Email** button that appears on the upper toolbar of the **Purchase Order** screen. The following screen appears:

Figure 156: Purchase Order Reports Screen



4. Highlight the preferred layout for your Purchase Order.

5. Click the **Email by PDF** button at the top of the screen. An email addressed to the primary contact will open with an attached PDF file of the Purchase Order.

SmartVault Integration

The Results SmartVault Integration provides Results users with an innovative and effective in-the-cloud document management solution. Using this tool, users can scan, upload, and attach documents to any Results record. Results users can access the attached documents from within Results or directly from SmartVault's custom-branded Web Portal. This integration leverages Results' and SmartVault's renowned bi-directional integration with QuickBooks to deliver the ultimate 3-way document management solution for Results, SmartVault and QuickBooks users. The Results SmartVault Integration is included in all versions of Results.

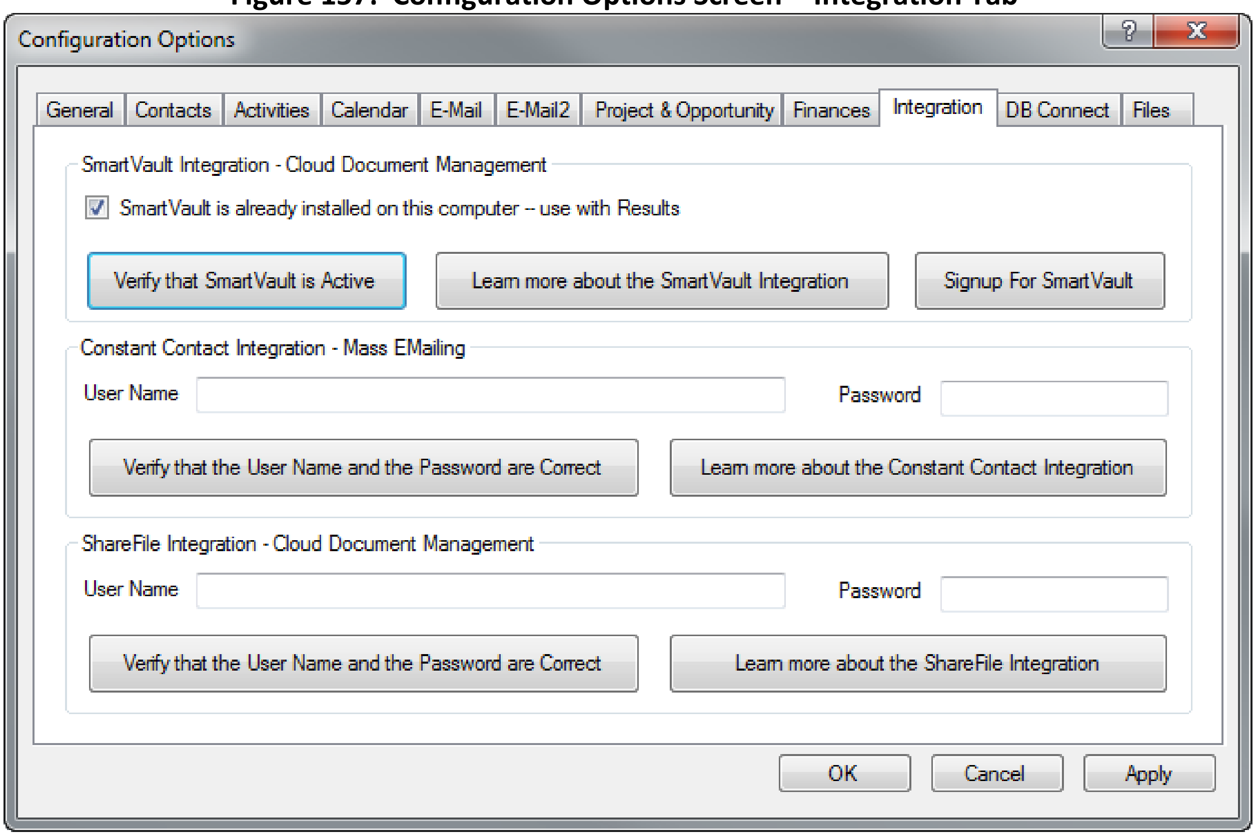
After configuring SmartVault to work with Results, SmartVault Integration is available at both the Data Management Center level and the Results record level.

How to Configure SmartVault Integration

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The Configuration Options screen displays.

2. Click the **Integration** tab.

Figure 157: Configuration Options Screen – Integration Tab



3. If you are an existing SmartVault customer, place a check in the “SmartVault is already installed on this computer” checkbox and then select the **Verify that SmartVault is Active** button.

Note: If you would like to become a SmartVault customer, click the **Signup for SmartVault** button. After selecting a plan, you can perform this step.

4. When you get a message that reads “SmartVault is Working”, you are ready to use the SmartVault Integration module.

How to Attach Documents to a Results Record via SmartVault Integration:

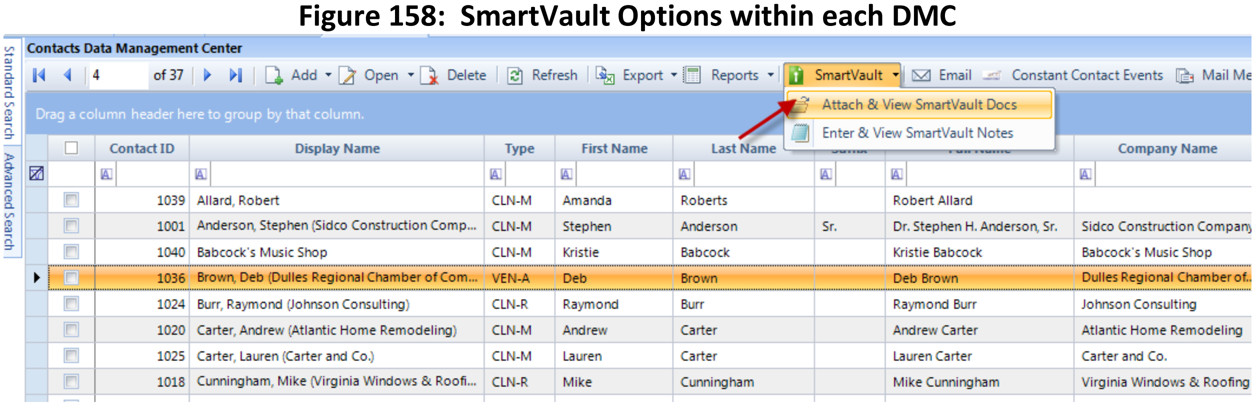
From Data Management Centers

1. Open the appropriate Data Management Center. For example, to attach records to a Contact record, open the Contacts DMC.

2. Highlight the Results record that you would like to attach the document to.

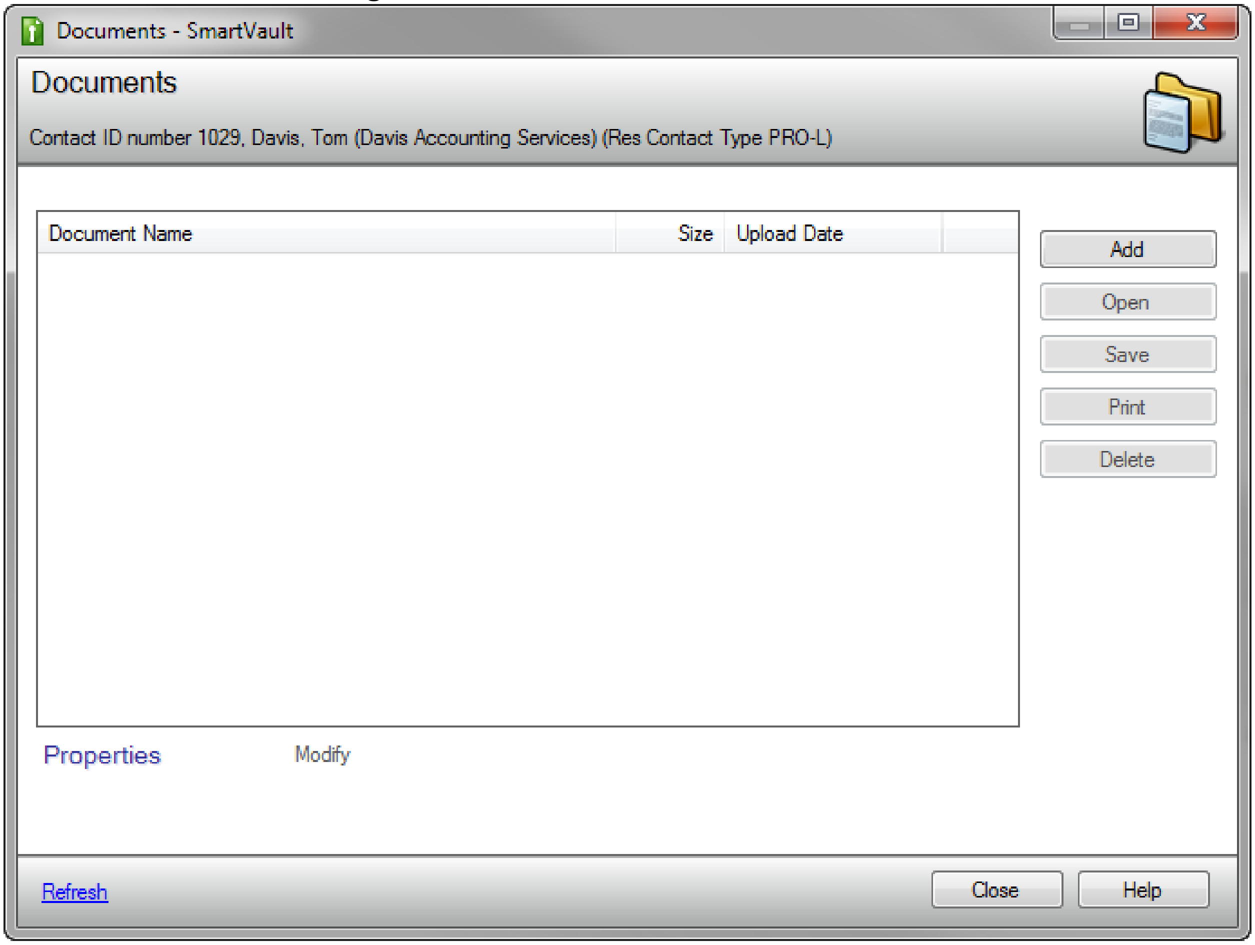
3. Click on the **SmartVault** button at the top of the DMC and then select the **Attach & Edit SmartVault Docs** option.

Figure 158: SmartVault Options within each DMC



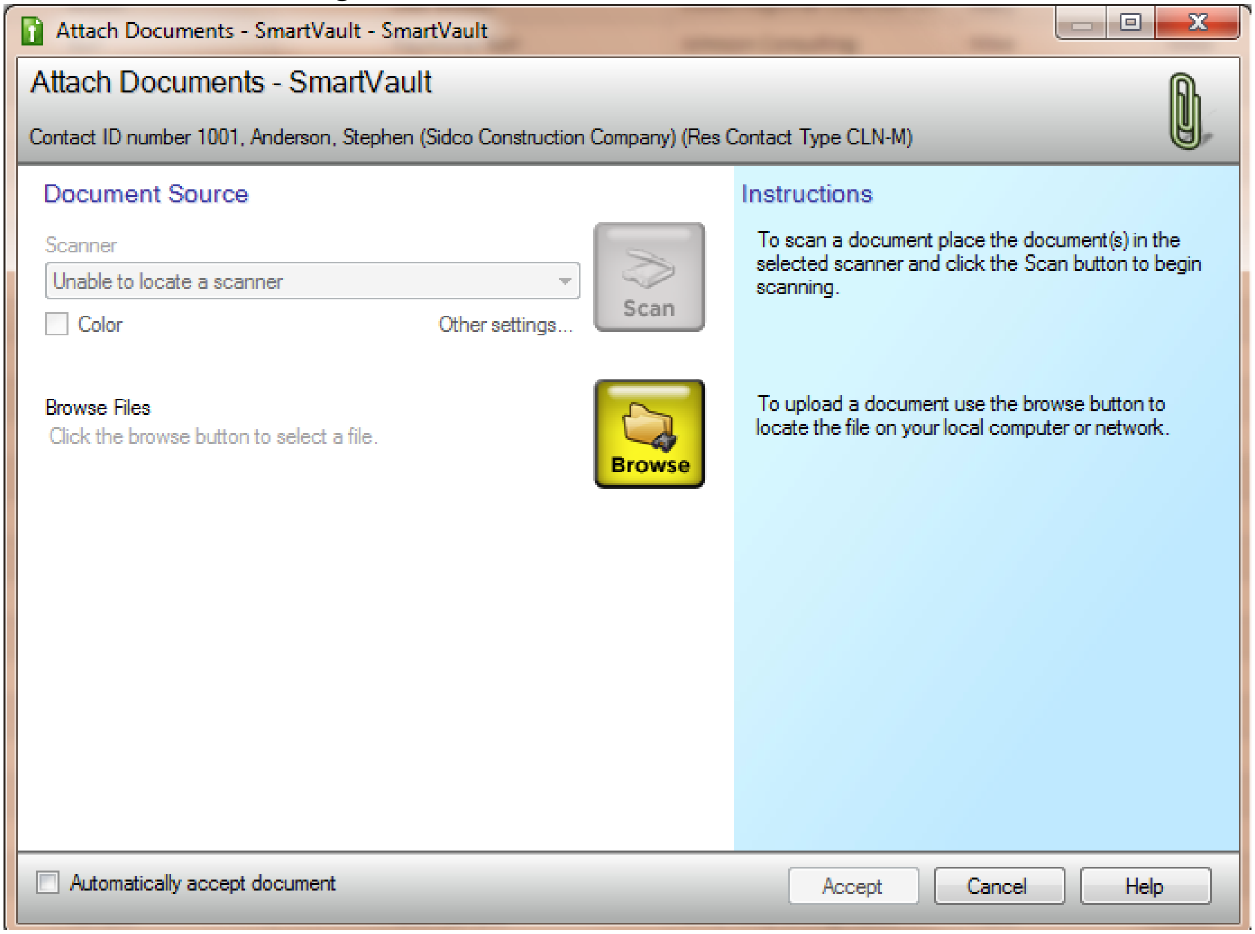
4. The SmartVault Documents screen appears. Click the **Add** button.

Figure 159: SmartVault Documents Screen



5. The **Documents – SmartVault** screen appears as shown below.

Figure 160: Attach Documents - SmartVault



6. Click the **Browse** button to select a file from your computer or network.
   Note: Alternatively, if you have an active scanner, the **Scan** button will be available for use.

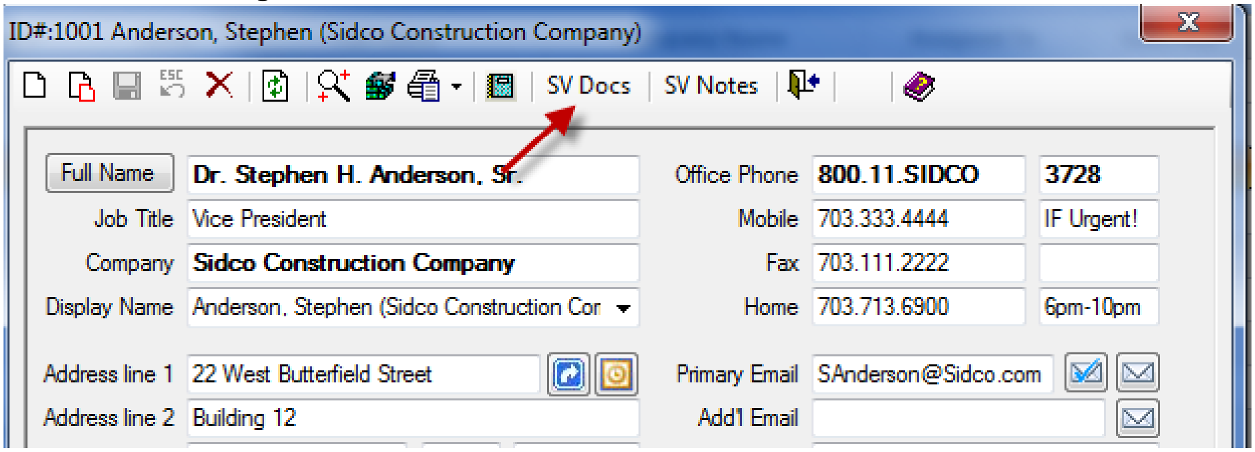
7. Click the **Accept** button to attach the document to the record.

From a Results Record:

1. Use the appropriate DMC to search for the record. Double-click on the record you would like to open.

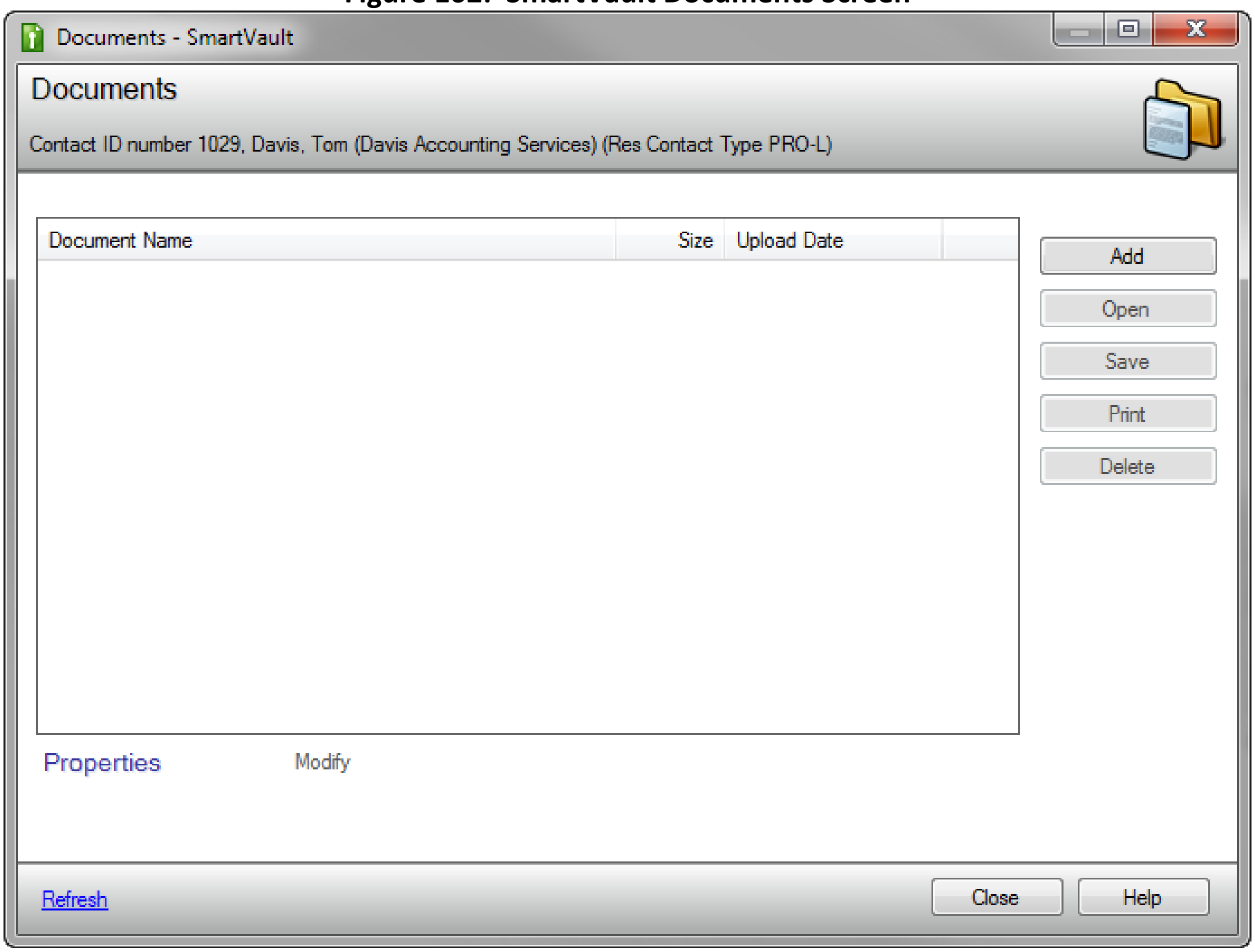
2. Click on the **SV Docs** button that appears on the top of the screen.

Figure 161: SmartVault Documents Button on a Results Record



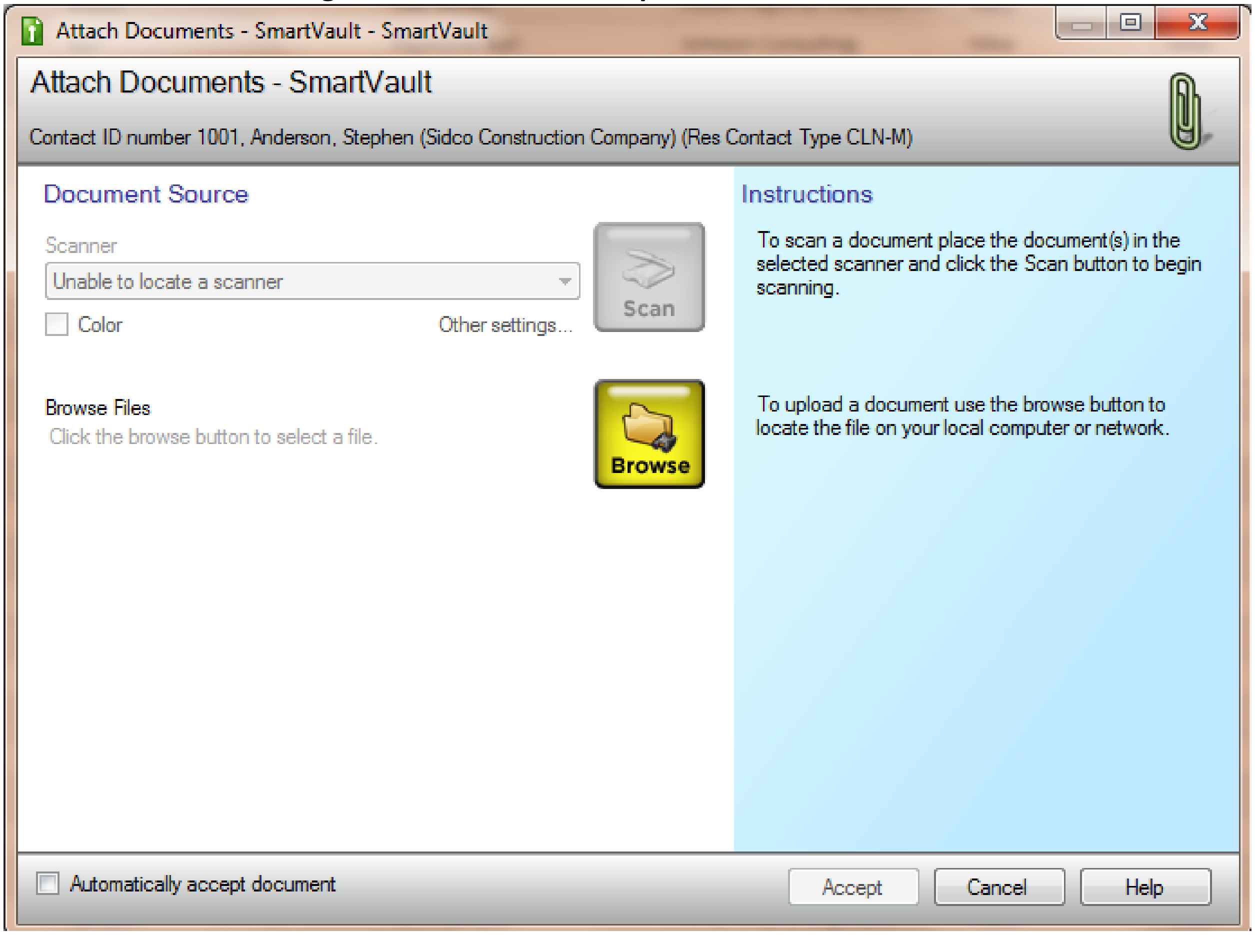
3. The SmartVault Documents screen appears. Click the **Add** button.

Figure 162: SmartVault Documents Screen



4. The **Attach Documents – SmartVault** screen appears as shown below.

Figure 163: SmartVault Options within each DMC



5. Click the **Browse** button to select a file from your computer or network.
   Note: Alternatively, if you have an active scanner, the **Scan** button will be available for use.

6. Click the **Accept** button to attach the document to the record.

How to View Documents Attached to a Results Record via SmartVault Integration:

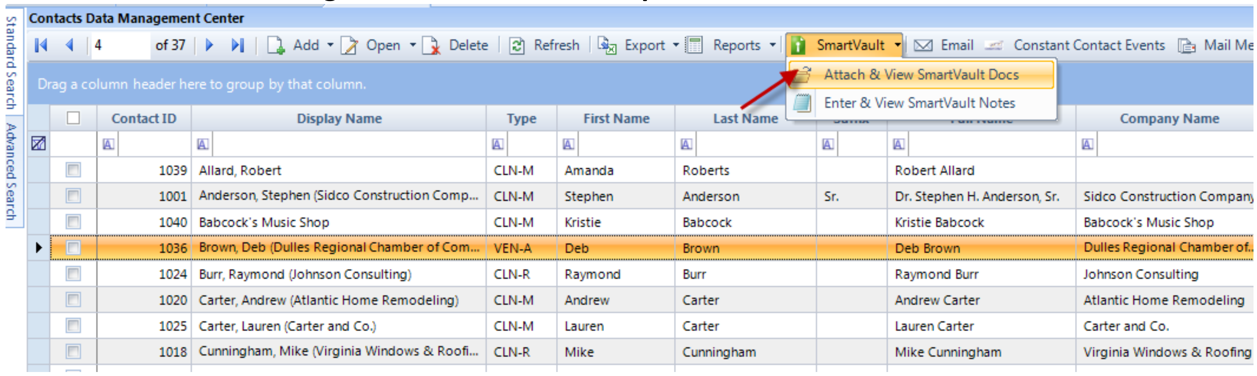
From Data Management Centers

1. Open the appropriate Data Management Center. For example, to view records attached to a Contact record, open the Contacts DMC.

2. Highlight the record to which you would like to attach the document.

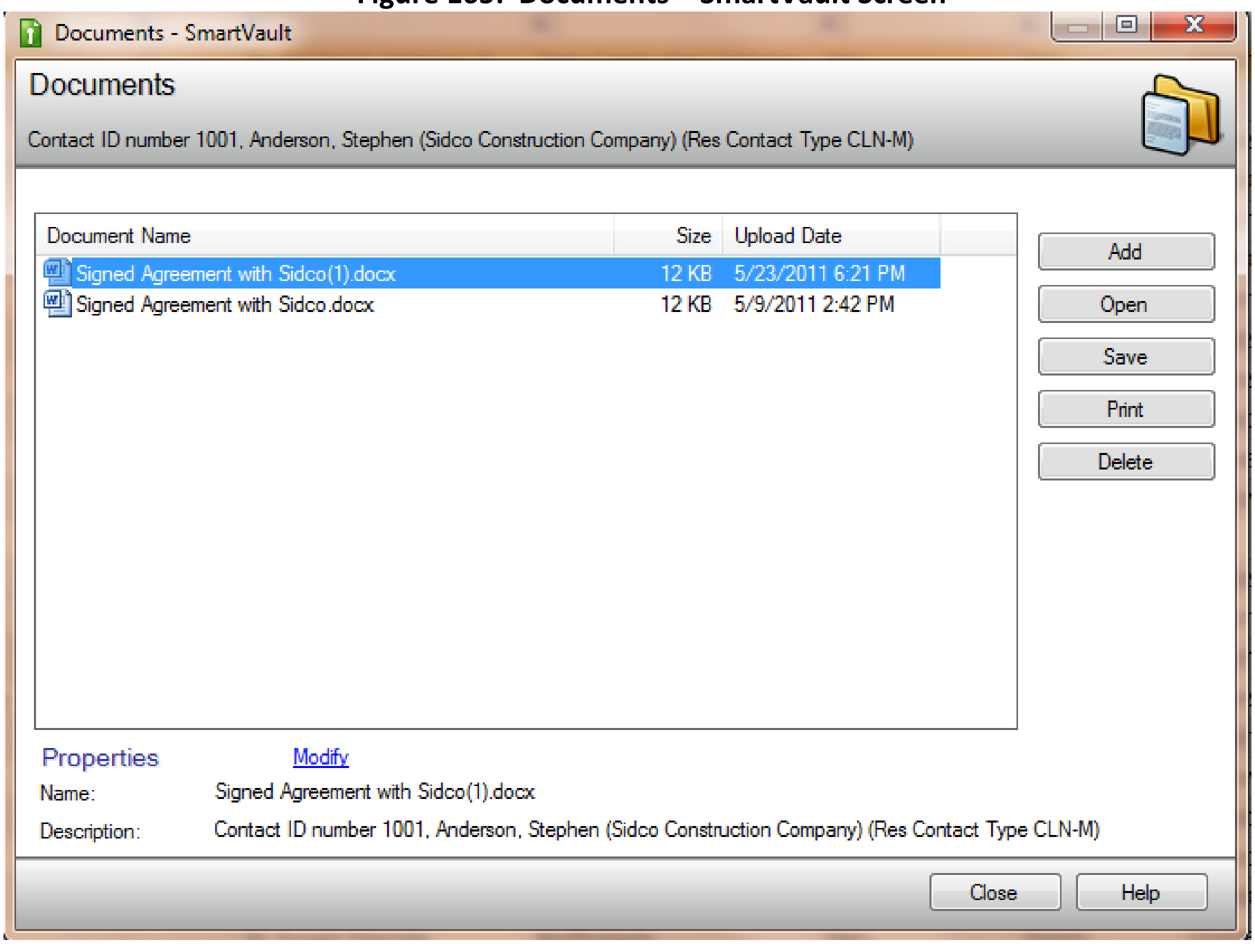
3. Click on the **SmartVault** button at the top of the DMC and then select the **Attach & View SmartVault Docs** option.

Figure 164: SmartVault Options within each DMC



4. The **Documents – SmartVault** screen appears as shown below.

Figure 165: Documents – SmartVault Screen



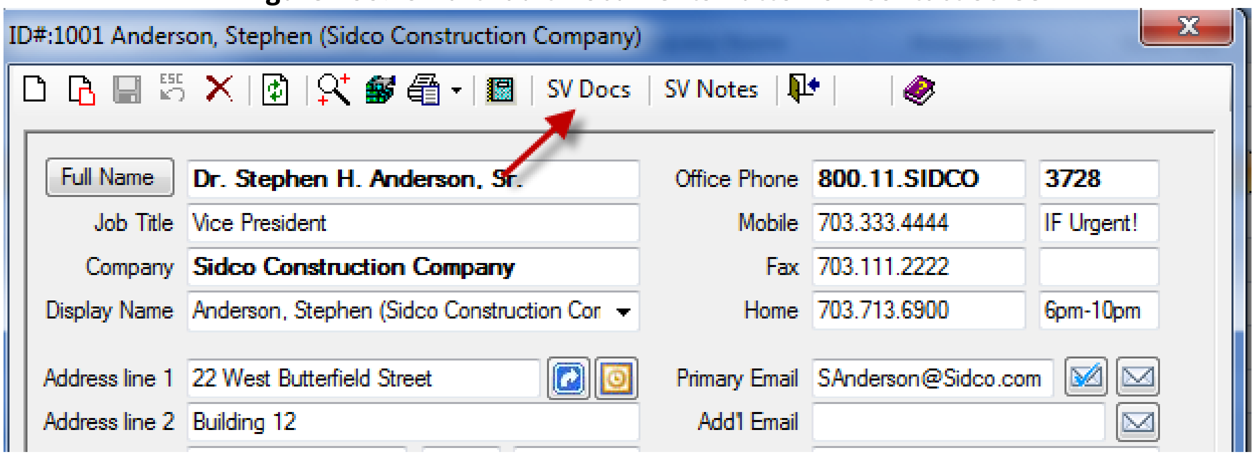
5. Highlight the desired document and click the **Open** button.

From a Results Record

1. Use the appropriate DMC to search for the record. Double-click on the record you would like to open.

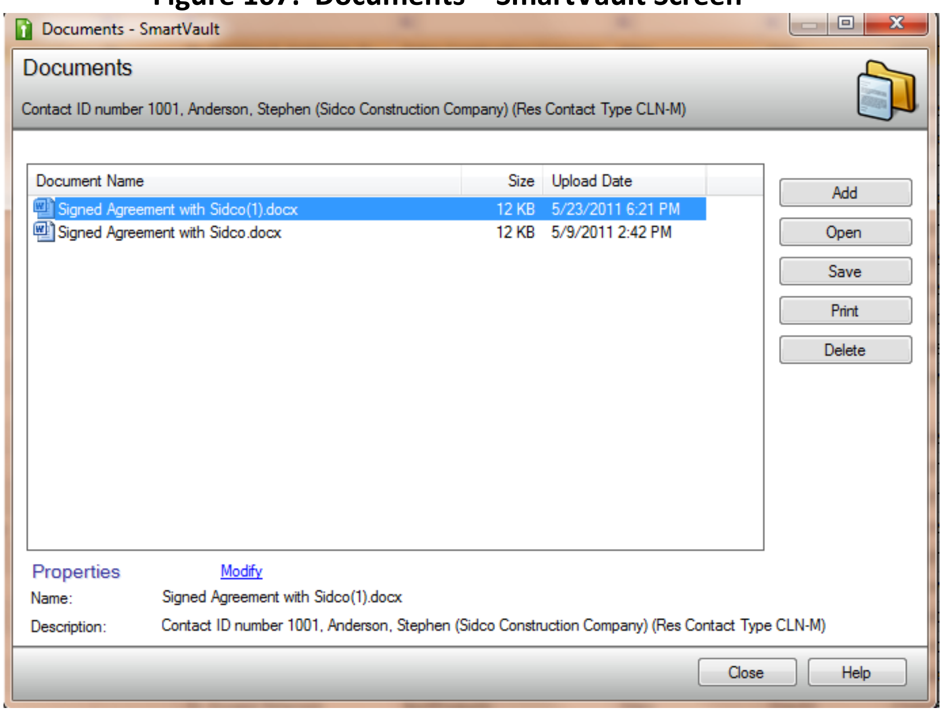
2. Click on the **SV Docs** button that appears on the top of the screen.

Figure 166: SmartVault Documents Button on Contact Screen



3. The **Documents – SmartVault** screen appears as shown below.

Figure 167: Documents – SmartVault Screen



4. Highlight the desired document and click the **Open** button.

How to Delete Documents Attached to a Results Record via SmartVault Integration:

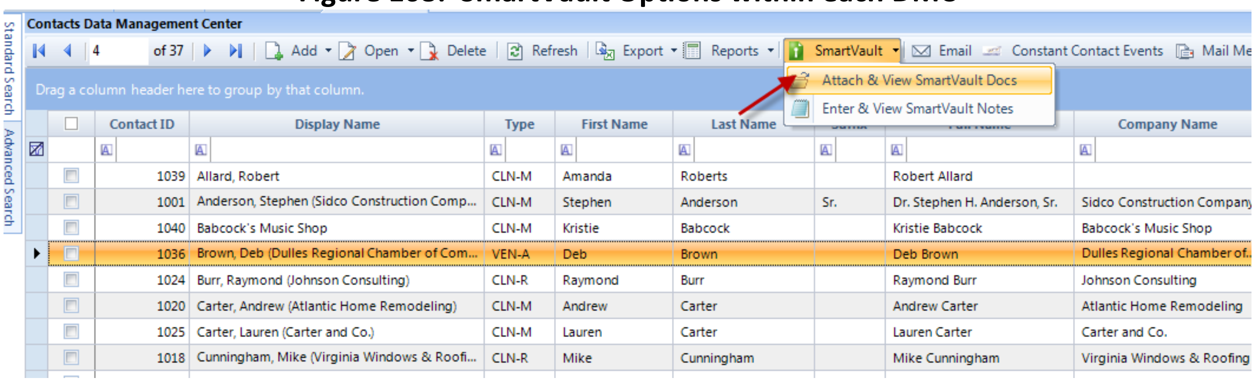
From a Data Management Center

1. Open the appropriate Data Management Center. For example, to attach records to a Contact record, open the Contacts DMC.

2. Highlight the record to which you would like to attach the document.

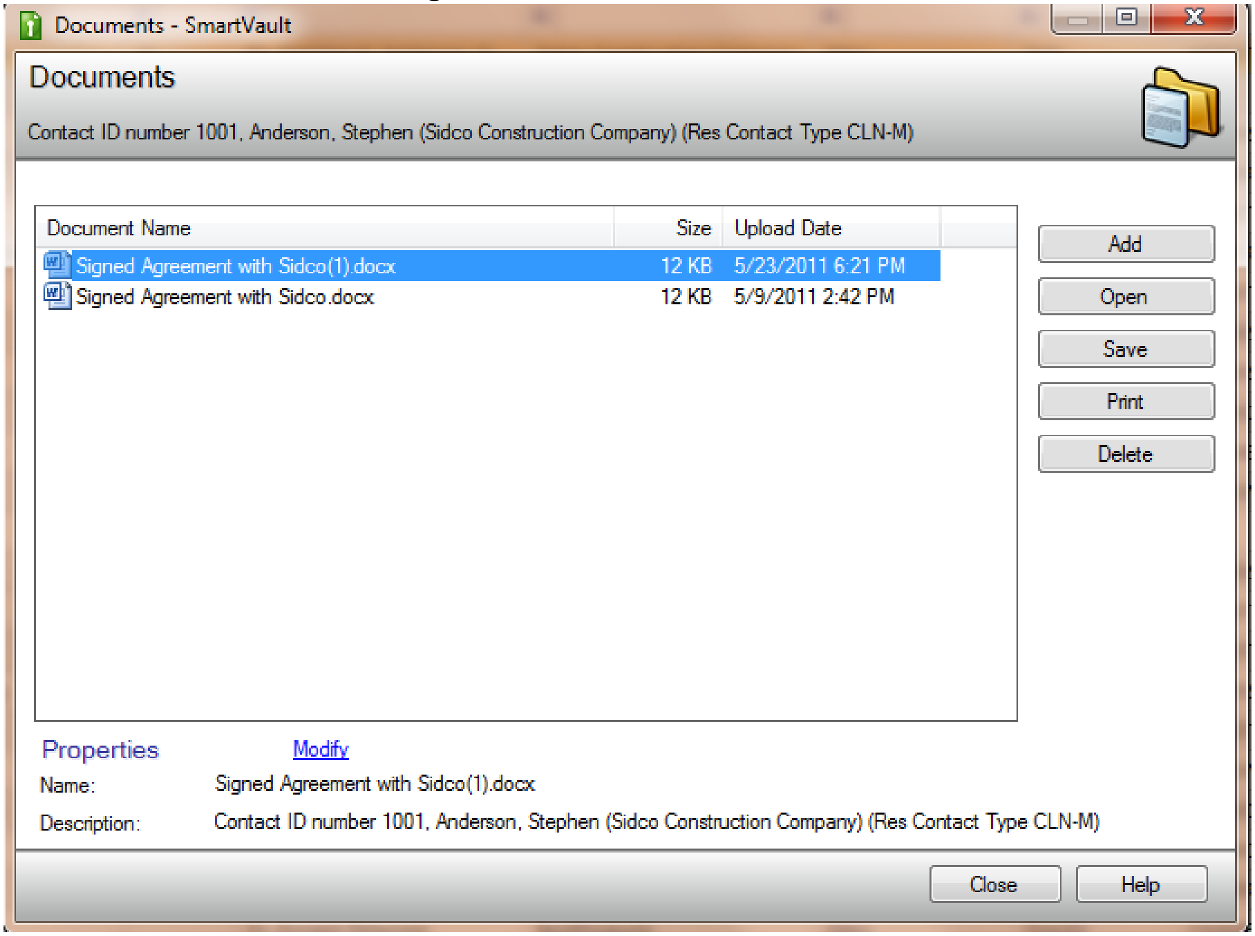
3. Click on the **SmartVault** button at the top of the DMC and then select the **Attach & View SmartVault Docs** option.

Figure 168: SmartVault Options within each DMC



4. The **Documents – SmartVault** screen appears as shown below.

Figure 169: Documents – SmartVault Screen



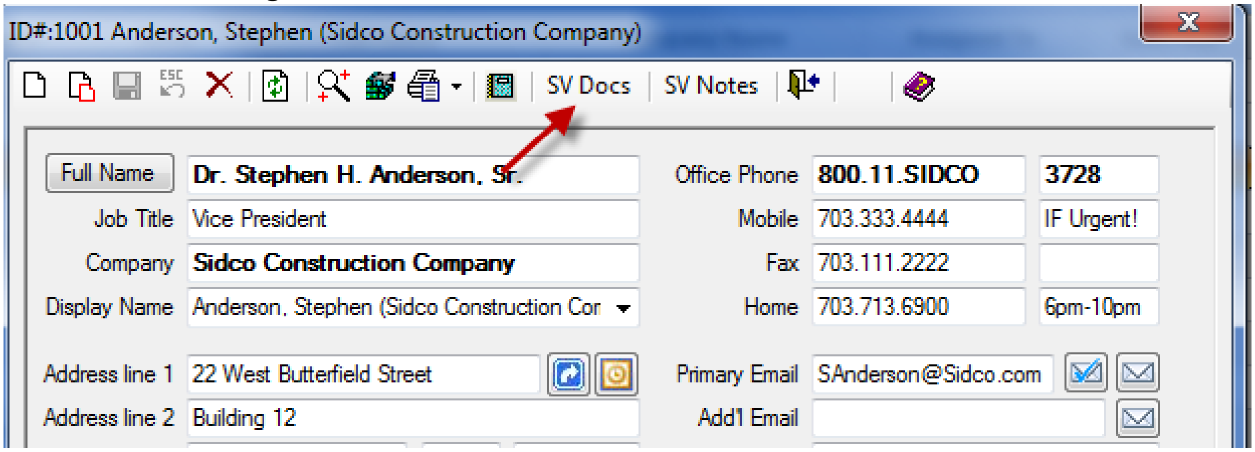
5. Highlight the desired document and click the **Delete** button.

From a Results Record

1. Use the appropriate DMC to search for the record. Double-click on the record you would like to open.

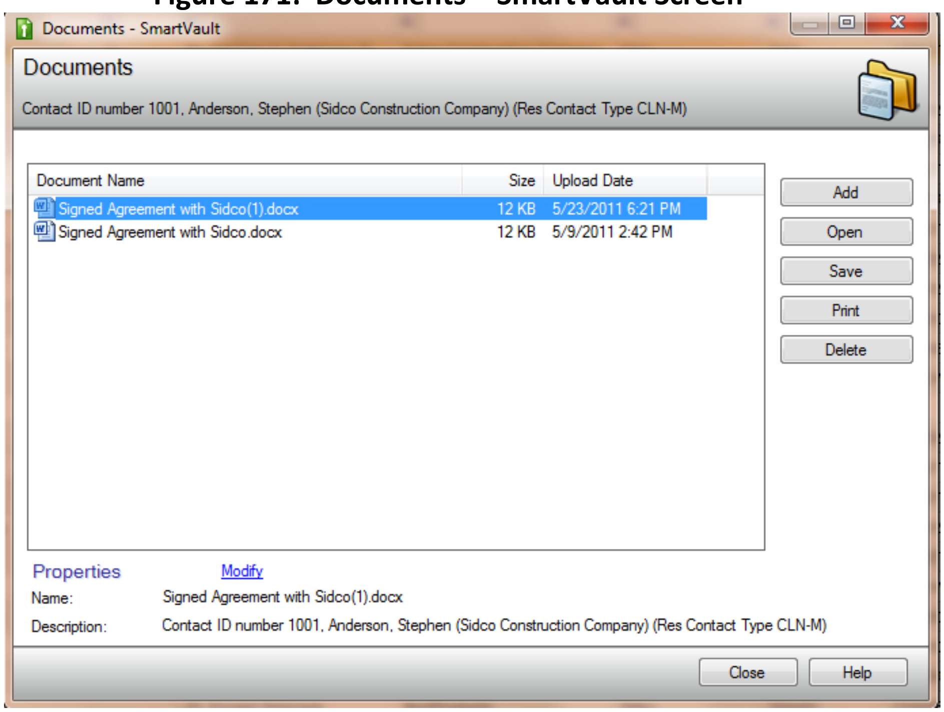
2. Click on the **SV Docs** button that appears on the top of the screen.

Figure 170: SmartVault Documents Button on Contact Screen



3. The **Documents – SmartVault** screen appears as shown below.

Figure 171: Documents – SmartVault Screen



4. Highlight the desired document and click the **Delete** button.

How to Rename a SmartVault Document in Results

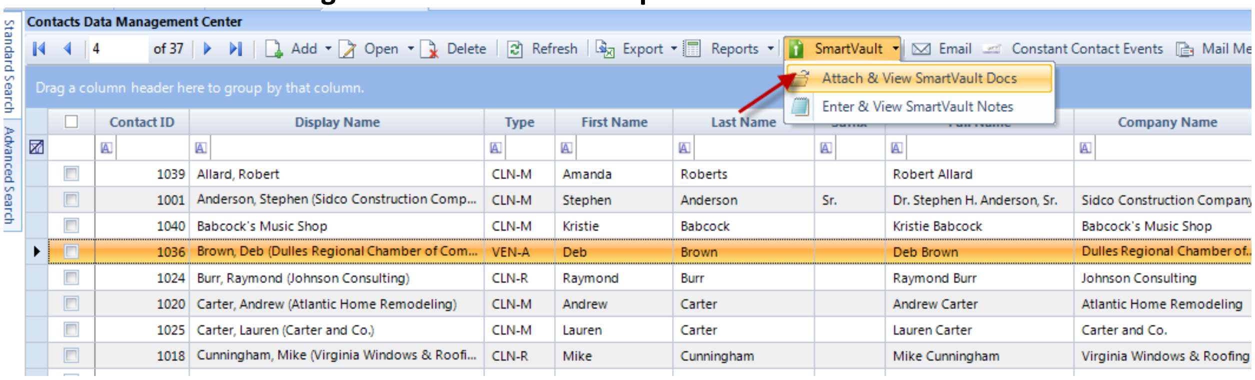
From a Data Management Center

1. Open the appropriate Data Management Center. For example, to open records attached to a Contact record, open the Contacts DMC.

2. Highlight the Results record that has an attached document.

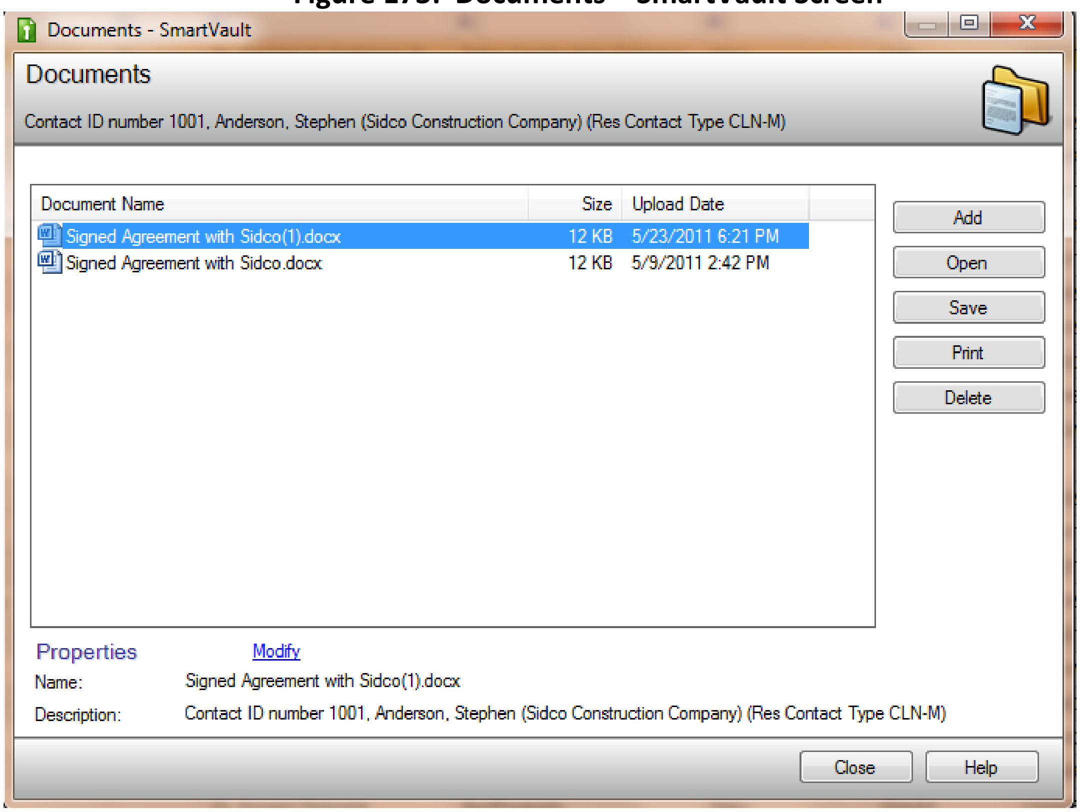
3. Click on the **SmartVault** button at the top of the DMC and then select the **Attach & View SmartVault Docs** option.

Figure 172: SmartVault Options within each DMC



4. The **Documents – SmartVault** screen appears as shown below.

Figure 173: Documents – SmartVault Screen



5. Highlight the desired document and click the **Modify** link at the bottom of the screen.

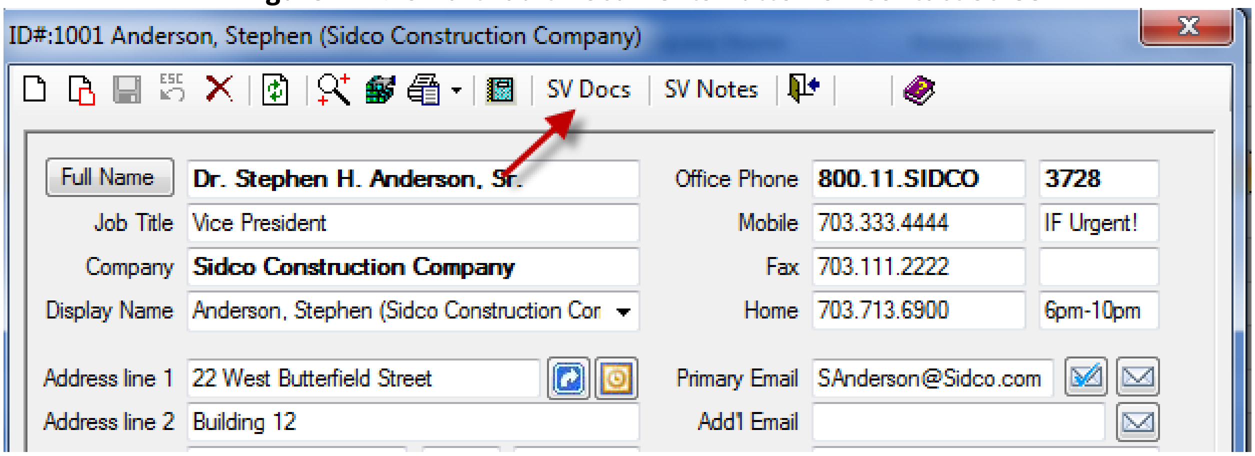
6. Edit the **Name** as necessary and then click the **Save** link.

From a Results Record

1. Use the appropriate DMC to search for the record. Double-click on the record you would like to open.

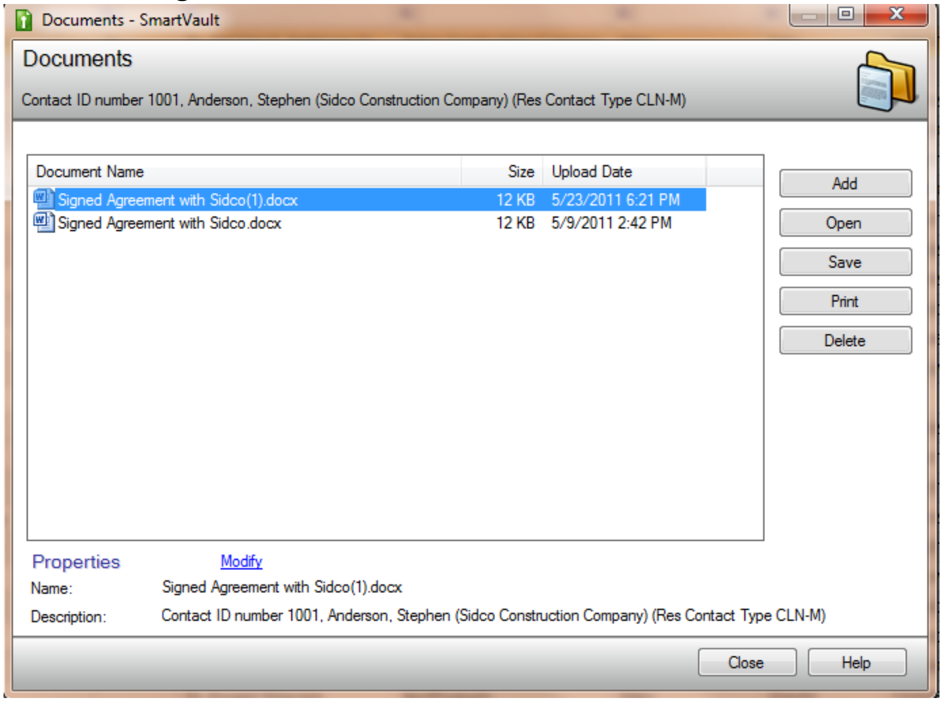
2. Click on the **SV Docs** button that appears on the top of the screen.

Figure 174: SmartVault Documents Button on Contact Screen



3. The **Documents – SmartVault** screen appears as shown below.

Figure 175: Documents – SmartVault Screen



4. Highlight the desired document and click the **Modify** link at the bottom of the screen.

5. Edit the **Name** as necessary and then click the **Save** link.

How to Synchronize QuickBooks and Results SmartVault Documents

If you have purchased the QuickBooks Integration module, the SmartVault Integration module will allow documents to appear within SmartVault, Results and QuickBooks, no matter which system was used to add them.

To Synchronize QuickBooks and Results SmartVault documents:

1. Setup the Results SmartVault Integration. Refer to the "How to Configure SmartVault Integration" section.

2. Perform QuickBooks Synchronization.

3. Documents added to QuickBooks records can be viewed from within Results; documents added to Results records will now appear within QuickBooks records.

How Add or Edit SmartVault Notes

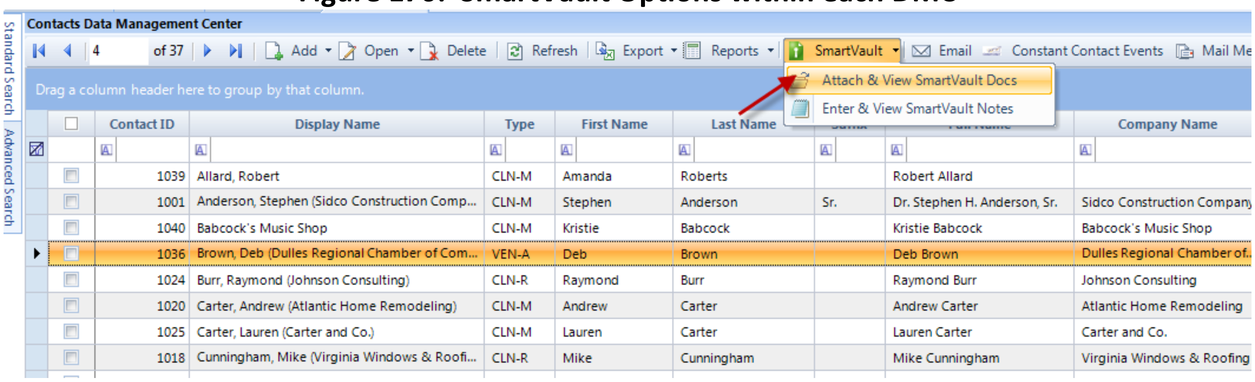
From Data Management Centers

1. Open the appropriate Data Management Center. For example, to attach records to a Contact record, open the Contacts DMC.

2. Highlight the Results record to which you would like to attach the document.

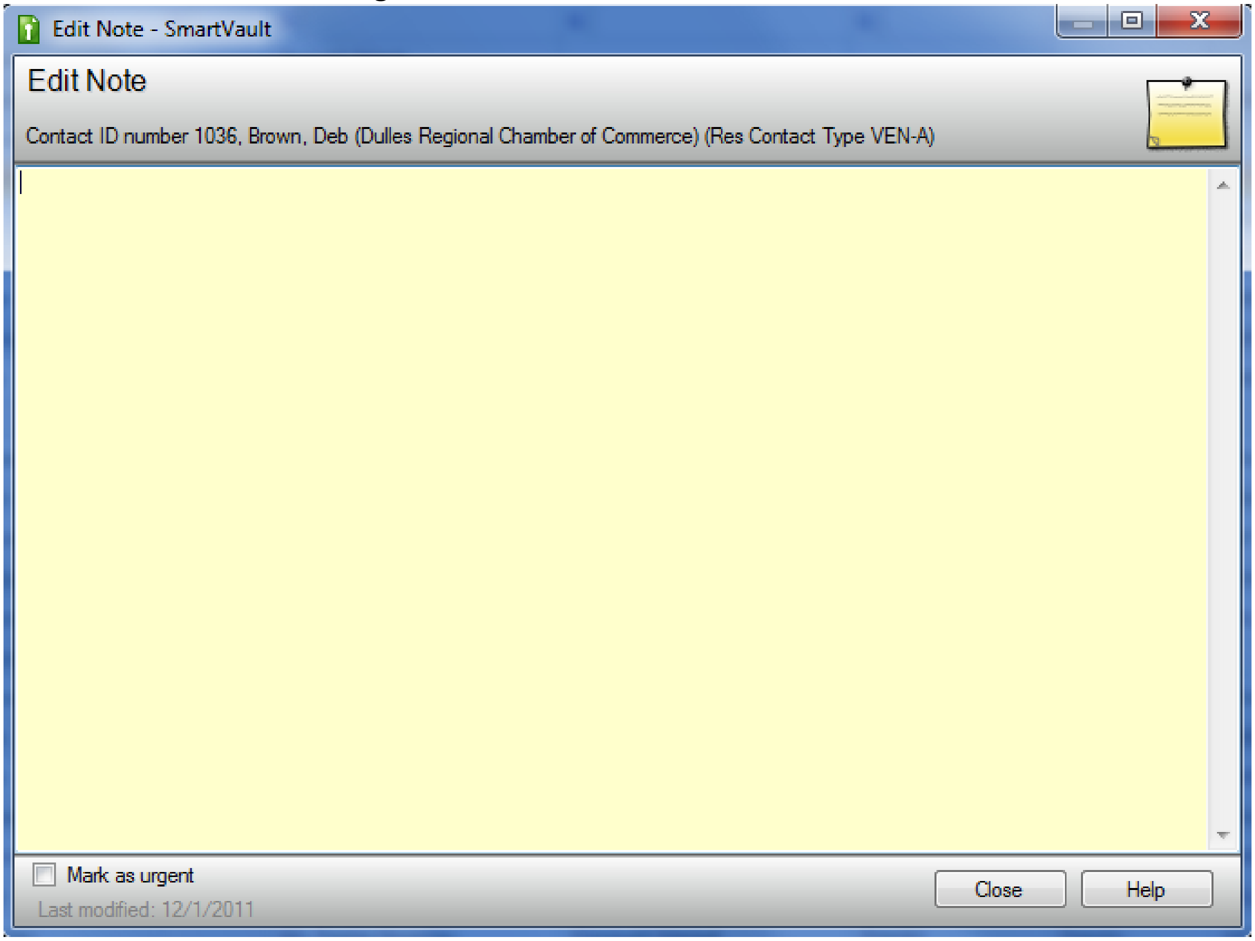
3. Click on the **SmartVault** button at the top of the DMC and then select the **Attach & Edit SmartVault Docs** option.

Figure 176: SmartVault Options within each DMC



4. The SmartVault Edit Notes screen appears.

Figure 177: SmartVault Edit Notes Screen



5. Type or edit your notes for this contact.

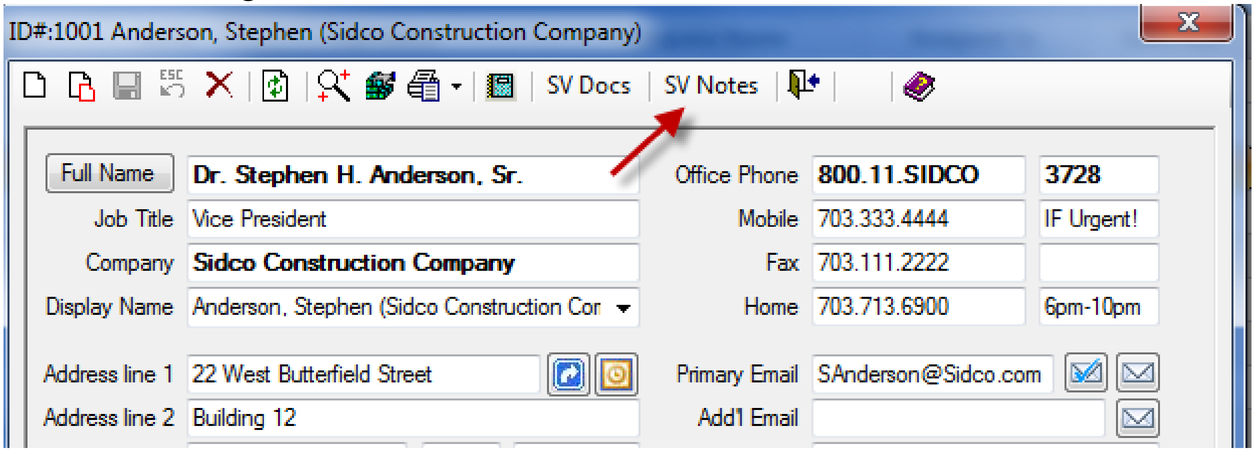
6. Click the **Close** button.

From a Results Record

1. Use the appropriate DMC to search for the record. Double-click on the record you would like to open.

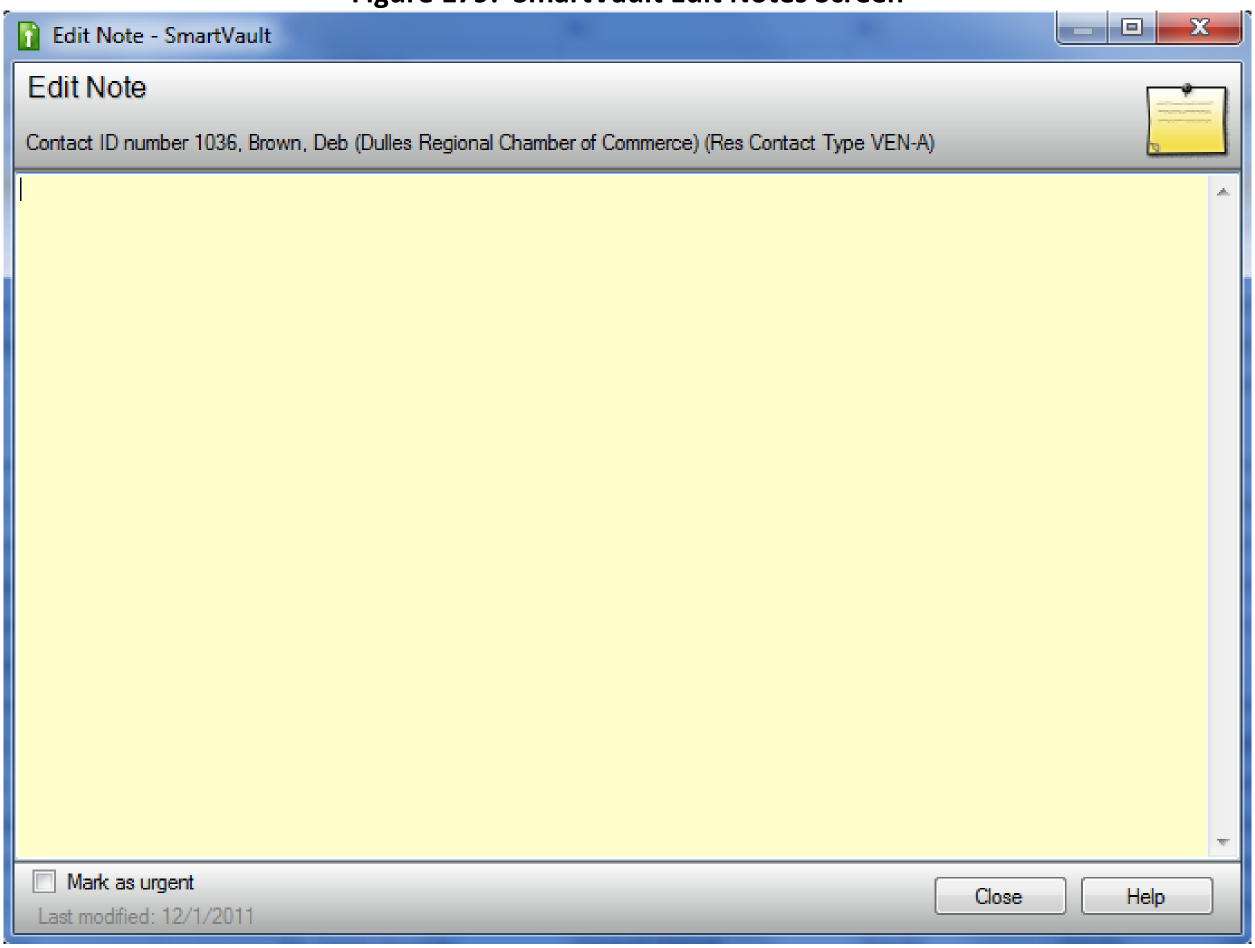
2. Click on the **SV Notes** button that appears on the top of the screen

Figure 178: SmartVault Documents Button on the Results Record



3. The SmartVault Edit Notes screen appears.

Figure 179: SmartVault Edit Notes Screen



4. Type or edit your notes for this contact.

5. Click the **Close** button.

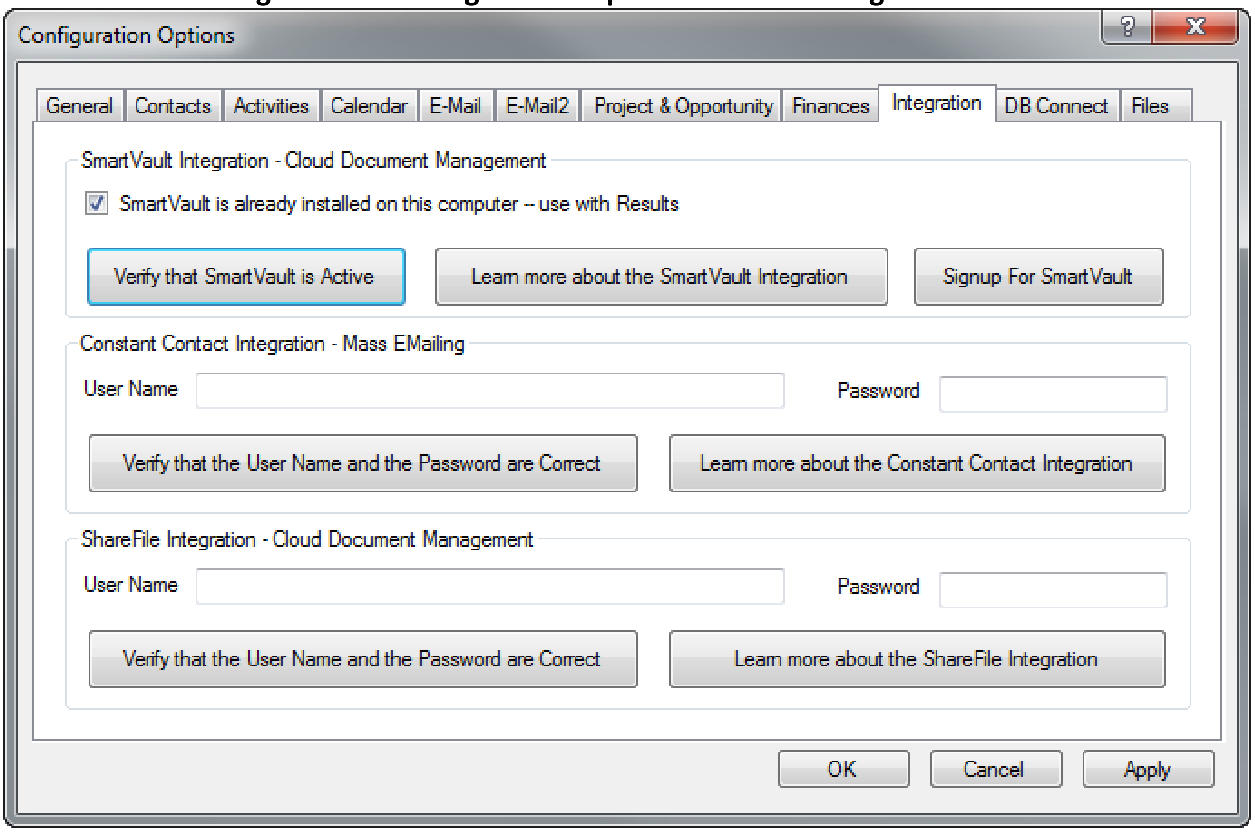
Constant Contact Integration

How to Configure Constant Contact Integration

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The Configuration Options screen displays.

2. Click the **Integration** tab.

Figure 180: Configuration Options Screen – Integration Tab



3. If you are an existing Constant Contact customer, enter your Constant Contact login credentials into the User Name and Password fields.

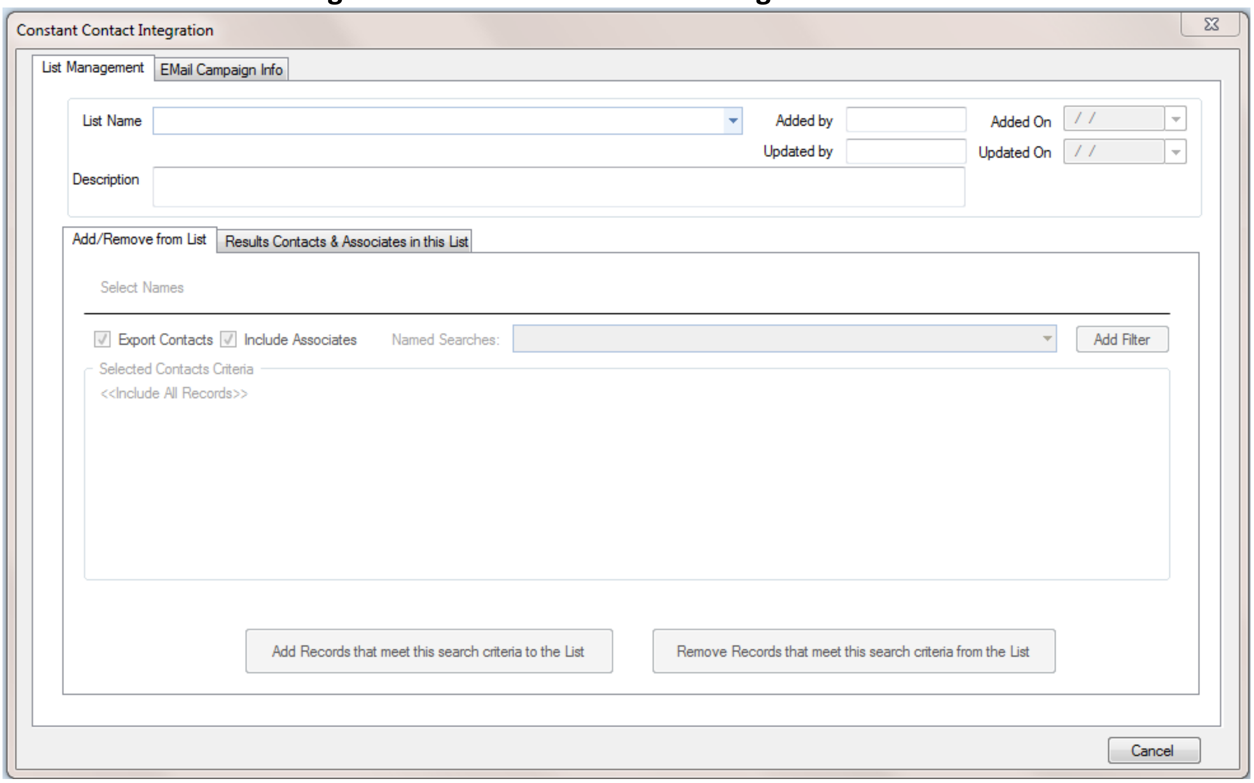
4. Click the **Verify that the User Name and the Password are Correct** button. **Note:** Credentials must be entered in order for the user to view Constant Contact integration information.

5. When you get a message that reads “Results Connected successfully to your Constant Contact account”, you are ready to use the Constant Contact Integration module.

How to Create Email Distribution Lists for a Constant Contact Mailing:

1. On the **Contacts** tab, in the **Integration** group, click **Constant Contact**. The Constant Contact screen displays.

Figure 181: Constant Contact Integration Screen



2. Select the first option from the **List Name** drop-down ("Click here to Create a New List"). Type a new **List Name** in that field.

3. Provide a **Description** for your list.

4. Click the **Save** button on the top portion of the screen.

5. On the **Add/Remove from List** tab, select an entry from the **Named Searches** that contains the criteria for the Contacts you would like displayed on your list. **Note:** To create a new Named Search or to modify an existing Named Search, click the **Add Filter** button. The Named Search screen will appear. Please refer to the chapter on Named Searches for additional information.

6. After a Named Search is selected, click the **Add Records that meet the search criteria to the List** button.

7. On the **Results Contacts & Associates in the List** tab, review the list of contacts. To remove any of the listed contacts, highlight the record and then click the **Remove Selected**

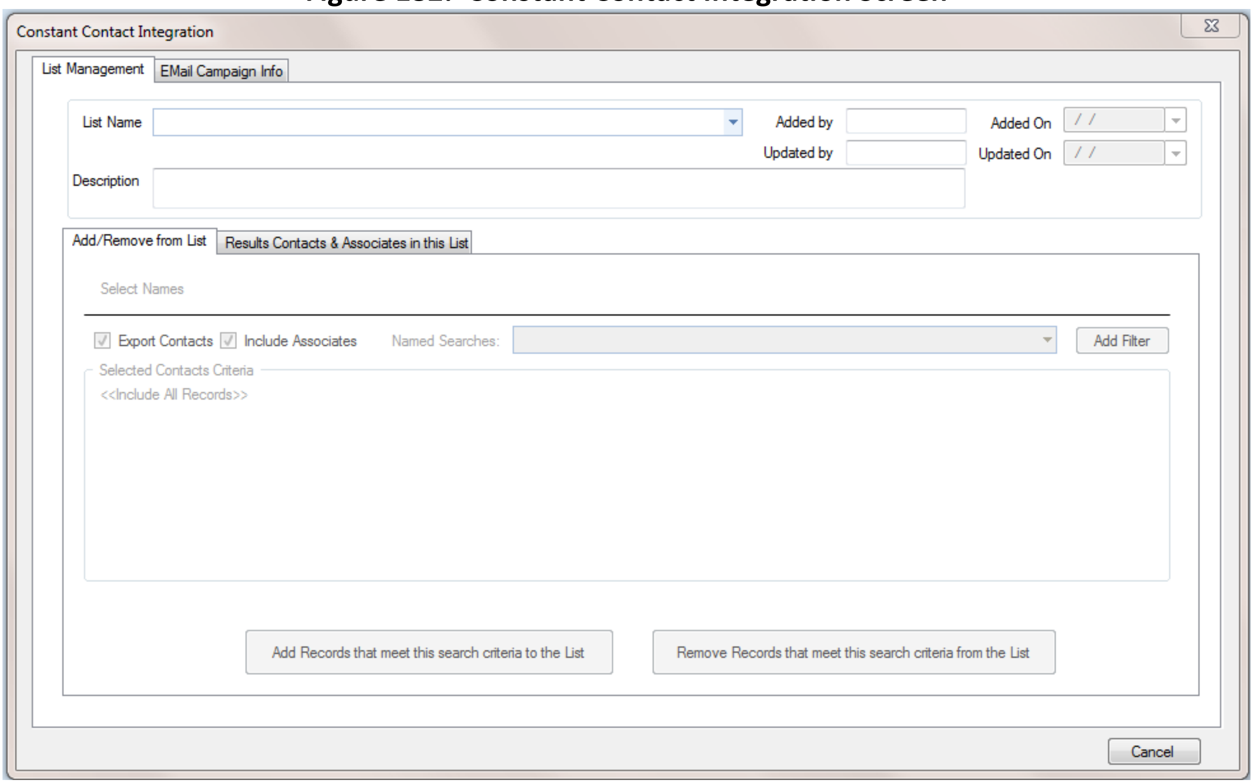
Record(s) from List before Exporting button. **Note:** Hold the Ctrl button down to highlight more than one record at a time.

8. When you are satisfied with your list, click the **Export/Replace this List in Constant Contact**. If this is a new List Name, it will now appear within Constant Contact. If this List Name already exists in Constant Contact, it will replace the contents of that list with what you just imported.

How to Edit or Refresh Email Distribution Lists for a Constant Contact Mailing:

1. On the **Contacts** tab, in the **Integration** group, click **Constant Contact**. The Constant Contact screen displays.

Figure 182: Constant Contact Integration Screen



2. Select the list that you would like to edit from the **List Name** field.

3. Click the **Edit** button on the top portion of the screen.

4. On the **Add/Remove from List** tab, select a **Named Search** that contains the criteria for the Contacts you would like displayed on your list. **Note:** To create a new Named Search or to modify an existing Named Search, click the **Add Filter** button. The Named Search screen will appear. Please refer to the chapter on Named Searches for additional information.

5. After a Named Search is selected, click the **Add Records that meet the search criteria to the List** button.

6. On the **Results Contacts & Associates in the List** tab, review the list of contacts. To remove any of the listed contacts, highlight the record and then click the **Remove Selected Record(s) from List before Exporting** button. **Note:** Hold the Ctrl button down to highlight more than one record at a time.

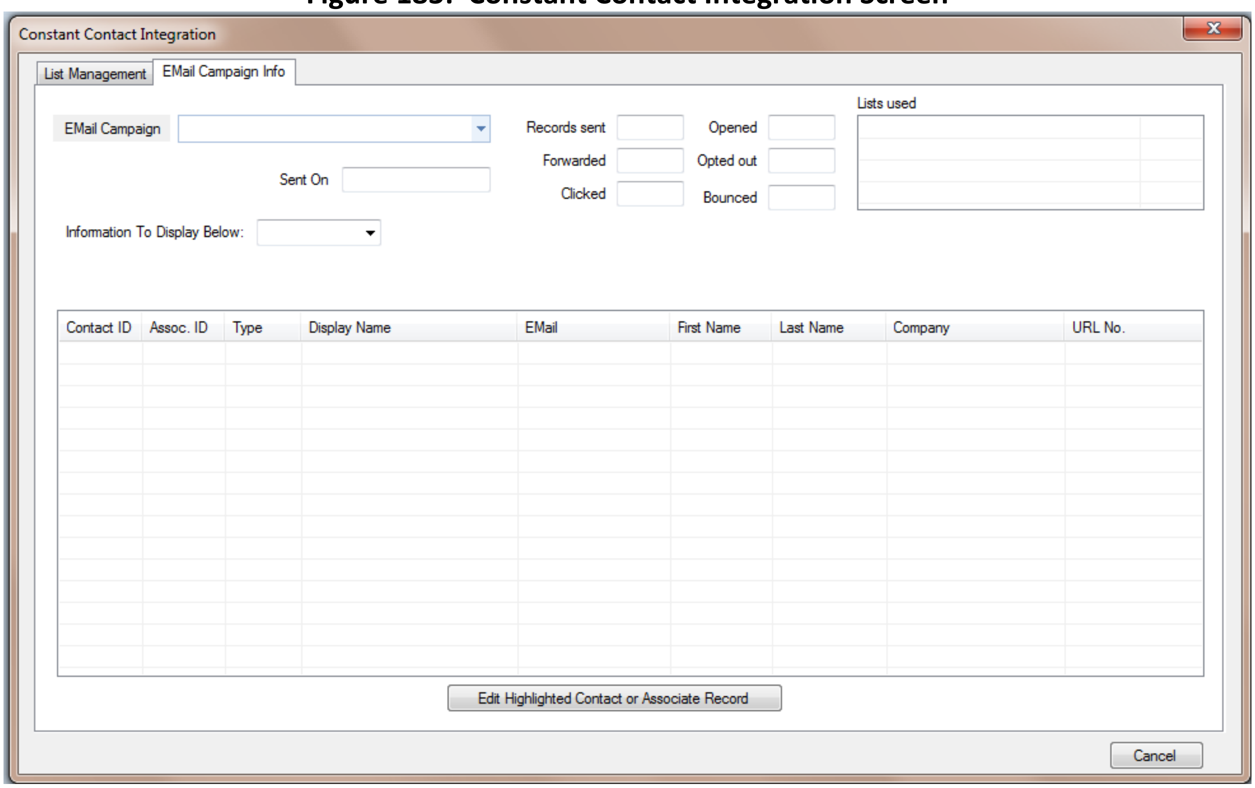
7. When you are satisfied with your list, click the **Export/Replace this List in Constant Contact**. The contents of this list will replace the lists stored in Constant Contact

How to View Constant Contact Campaign Info

1. On the **Contacts** tab, in the **Integration** group, click **Constant Contact**. The Constant Contact screen displays.

2. Click on the **Email Campaign Info** tab.

Figure 183: Constant Contact Integration Screen



3. Select an **Email Campaign** from the drop-down.

4. Information about the Email Campaign will automatically appear within the **Records sent**, **Forwarded**, **Clicked**, **Opened**, **Opted Out** and **Bounced** fields. The **Sent On** date and the **Lists Used** will also display.

5. To view the associated contacts within each category, select the desired value from the **Information to Display Below** field.

6. To edit or open any of the displayed contact records, highlight the record of interest and click the **Edit Highlighted Contact or Associate Record** button.

   Note: To sort the displayed information by a particular field, click the column heading once. A small up arrow appears above the column heading; search results will be sorted in ascending or chronological order by that field. Click the column heading a second time to display the information in descending or reverse chronological order.

How to View the Constant Contact Mailings Sent to a Particular Contact:

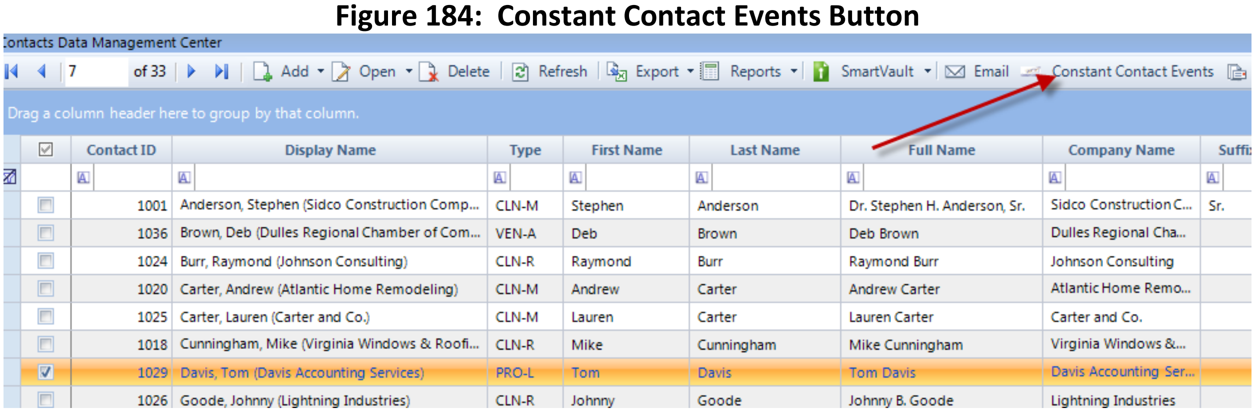
1. On the **Contacts** tab, in the **Contacts** group, click **Manage**. The **Contacts Data Management Center** will appear.

2. To narrow the list of records displayed, click on the **Standard Search** tab and perform a search for the records you would like to access.

3. Highlight the record or contact of interest.

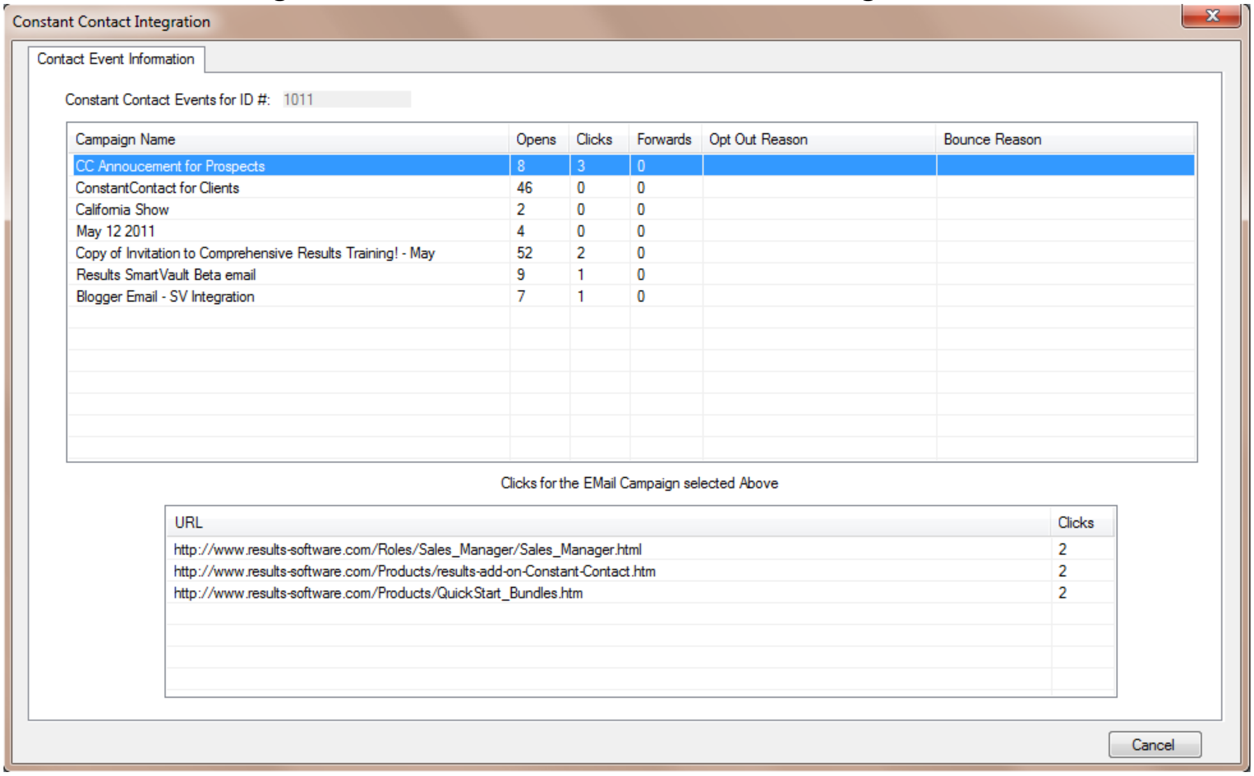
4. Click the **Constant Contact Events** button at the top of the DMC.

Figure 184: Constant Contact Events Button



5. The **Constant Contact Integration** screen will appear.

Figure 185: Individual's Constant Contact Integration Screen



This screen lists the emails that were sent to the individual. As you highlight the various emails on the top portion of the screen, the bottom portion of the screen will display any URLs the Contact clicked from within that email campaign.

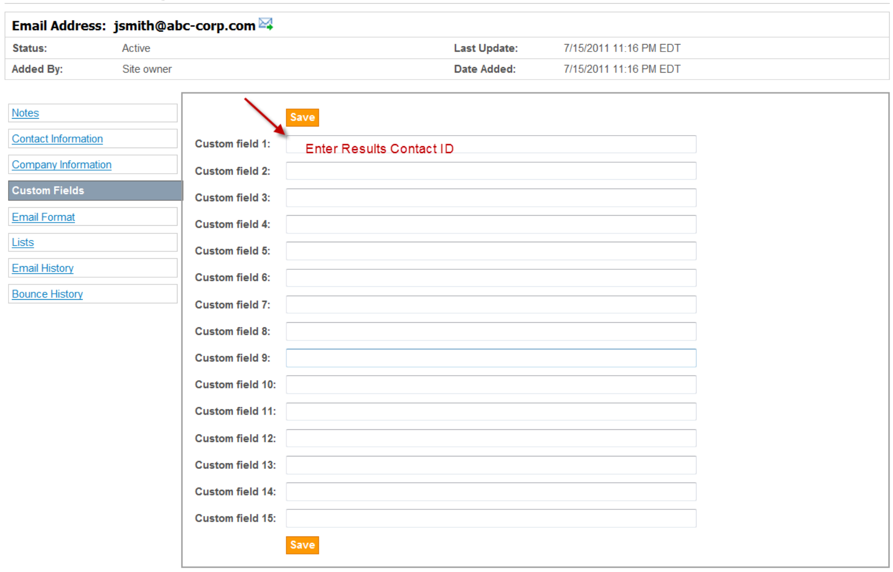
Note: Credentials must be entered on the Configuration Screen in order for the user to view Constant Contact integration information. Refer to How to Configure Constant Contact Integration for more information.

How to Link New Results Contact to an Existing Constant Contact Record:

If you create a new Results contact for an existing contact in Constant Contact, you will need to link the records so that the Constant Contact reports within Results reflect accurate information.

To do so, login to Constant Contact and enter the Results Contact ID into the **Custom Field 1** of the associated Constant Contact contact record.

Figure 186: Constant Contact's Custom Field #1



SharePoint Integration

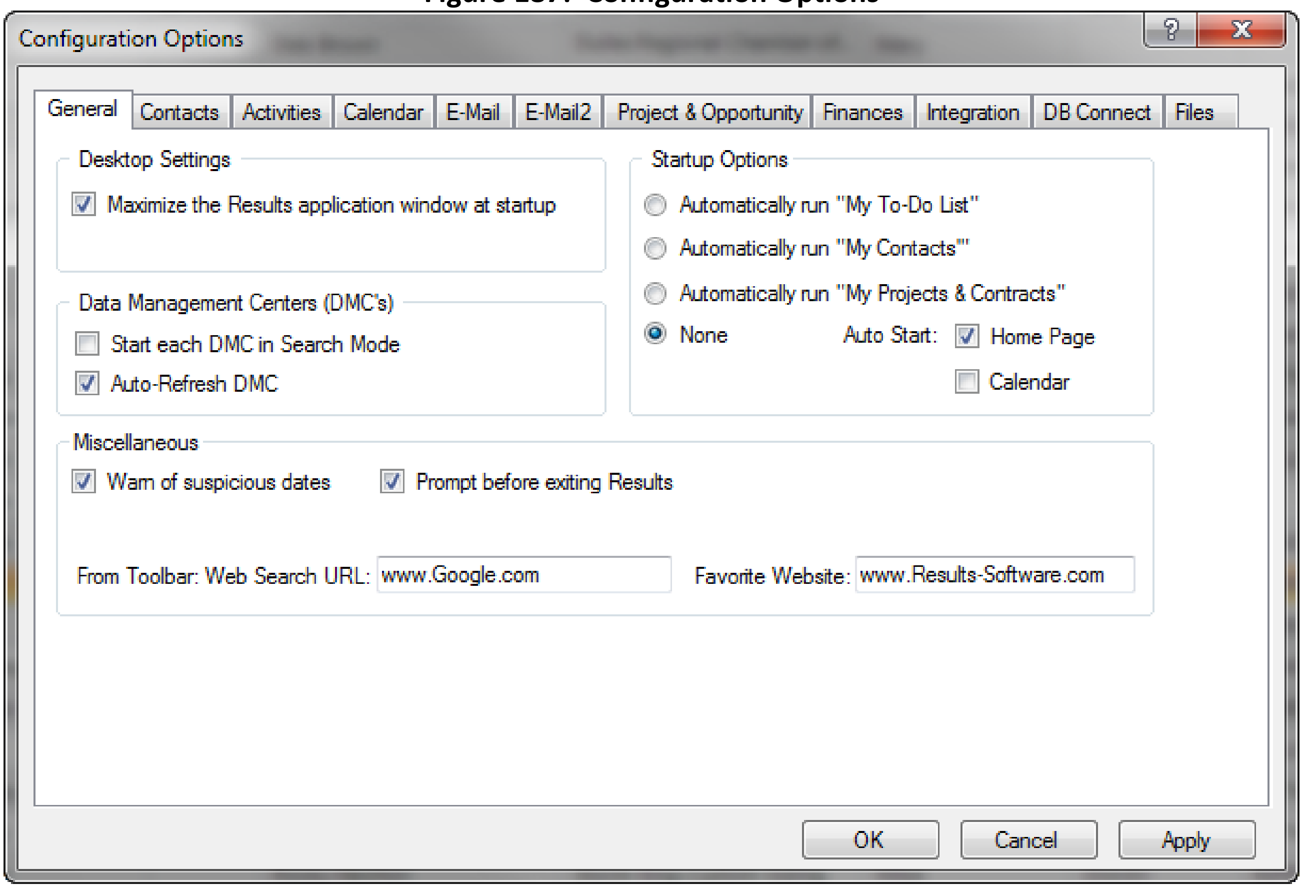
The Results SharePoint integration includes the document linking as well as the web icons on the Instant search that can be programmed by each user to point to any SharePoint location.

How to Access SharePoint within Results

SharePoint URLs can be directly accessed from within Results via the Instant Search icons so that users do not have to leave the system to access important documents.

1. To configure this option, navigate to the **Tools** tab. In the **Configuration** group, select **Options**. The following screen displays.

Figure 187: Configuration Options

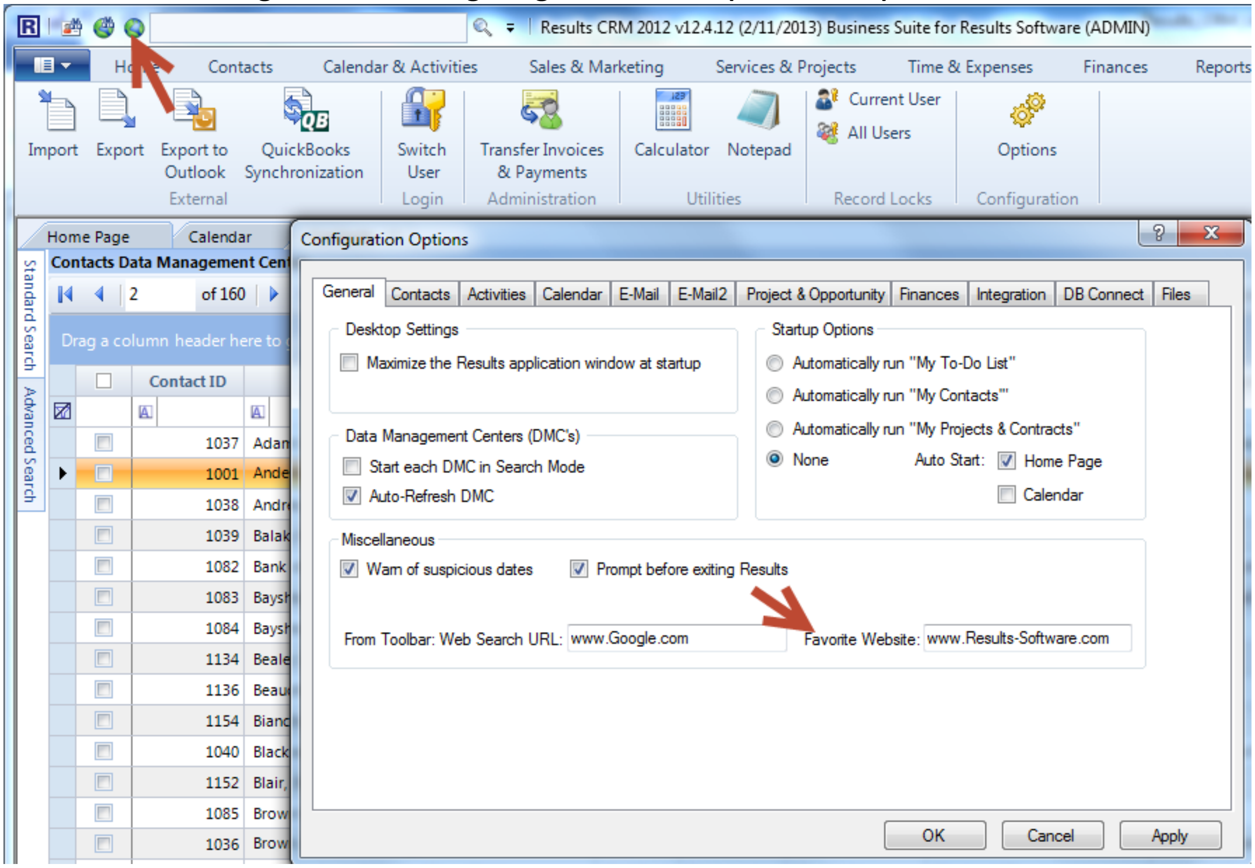


2. Enter your SharePoint URL into the **Favorite Website** field.

3. Make your changes and click the **Apply** button. **Note:** Some changes may not take effect until the next time you login to Results.

4. After configuring this option, click the third icon at the top of the Results screen to open your SharePoint URL.

Figure 188: Configuring the Favorite (SharePoint) Website URL

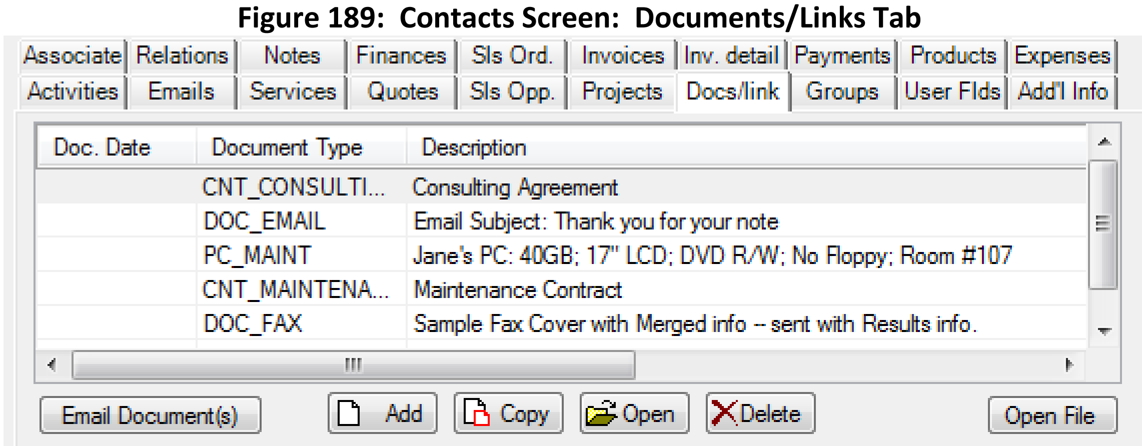


How to Link a SharePoint Document to a Contact Record

1. Open a Contact Record. (For more information, refer to *How to Open an Existing Contact Record*.)

2. Navigate to the **Docs/Links** tab.

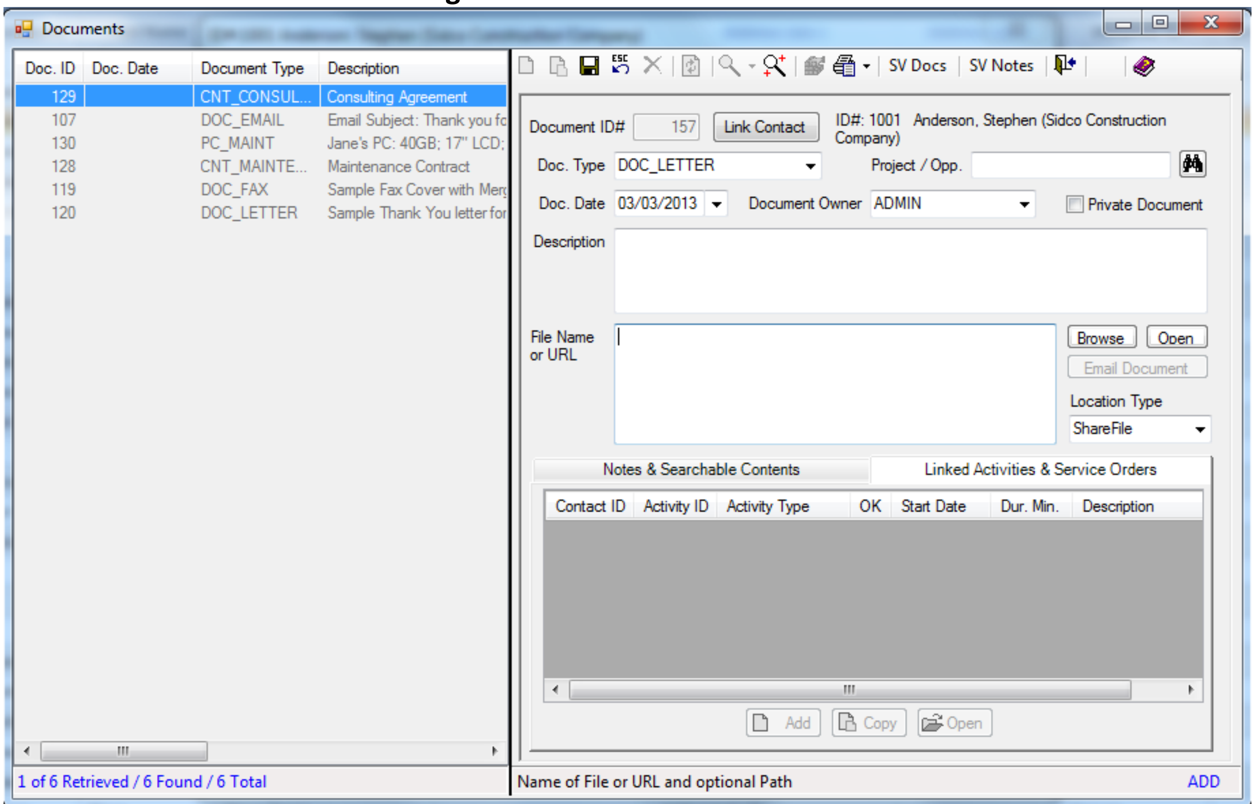
Figure 189: Contacts Screen: Documents/Links Tab



3. Click the **Add** button.

4. The **Documents** screen will appear with the Link Contact information. **Note:** Documents already associated with this Contact will appear in a grid on the left side of the screen.

Figure 190: Documents Screen



5. Choose an appropriate **Document Type.**

6. If applicable, choose to link the document to a **Project or Sales Opportunity** by clicking the binocular icon.

7. The **Doc Date** will default to today's date. Change this field if necessary.

8. Type in a **Description** of the Document.

9. Copy the URL into the Filed Name or URL box OR click the **Browse** button to locate and select the file you wish to link to Results.

10. In the **Location Type** field, select "SharePoint".

11. Click the  icon to save the record.

12. Close the screen. The new document will appear under the **Docs/Link** tab of the appropriate contact.

ShareFile Integration

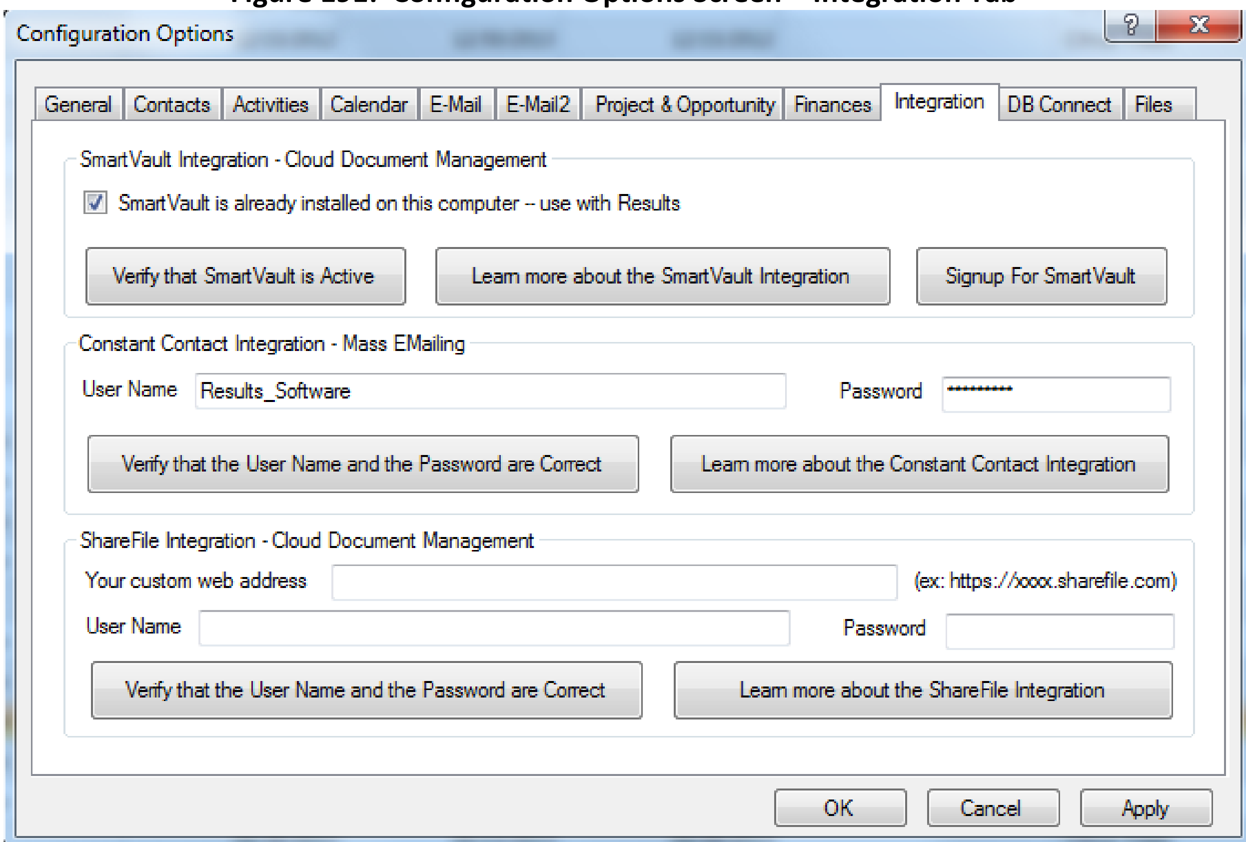
After configuring SmartVault to work with Results, SmartVault Integration is available at both the Data Management Center level and the Results record level.

How to Configure ShareFile Integration

1. On the **Tools** tab, in the **Configuration** group, click **Options**. The Configuration Options screen displays.

2. Click the **Integration** tab.

Figure 191: Configuration Options Screen – Integration Tab



3. If you are an existing ShareFile customer, enter in **Your custom web address**, **User Name** and **Password**.

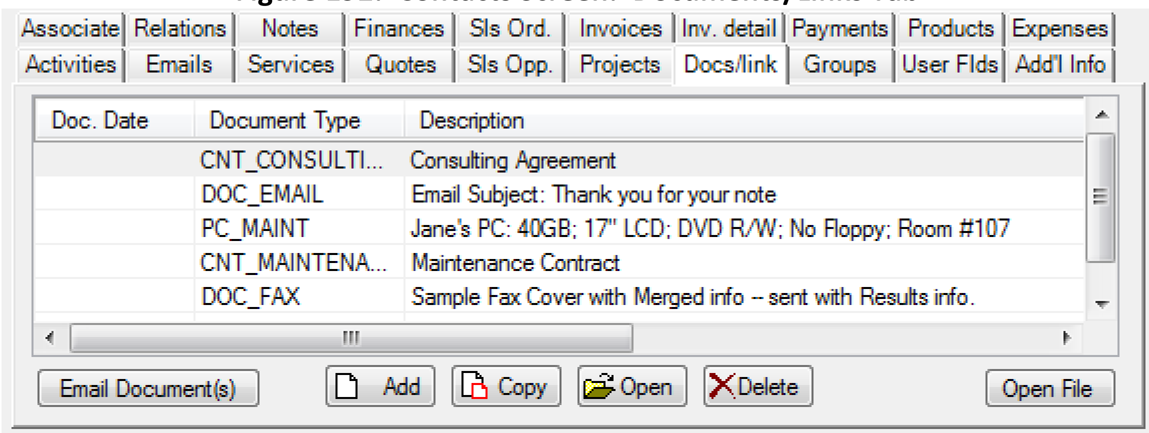
4. Click the **Verify that the User Name and Password are Correct** button. When you get a message that reads "Results connected successfully to your ShareFile account", you are ready to use the ShareFile Integration module.

How to Link a SharePoint Document to a Contact Record

1. Open a Contact Record. (For more information, refer to *How to Open an Existing Contact Record*.)

2. Navigate to the **Docs/Links** tab.

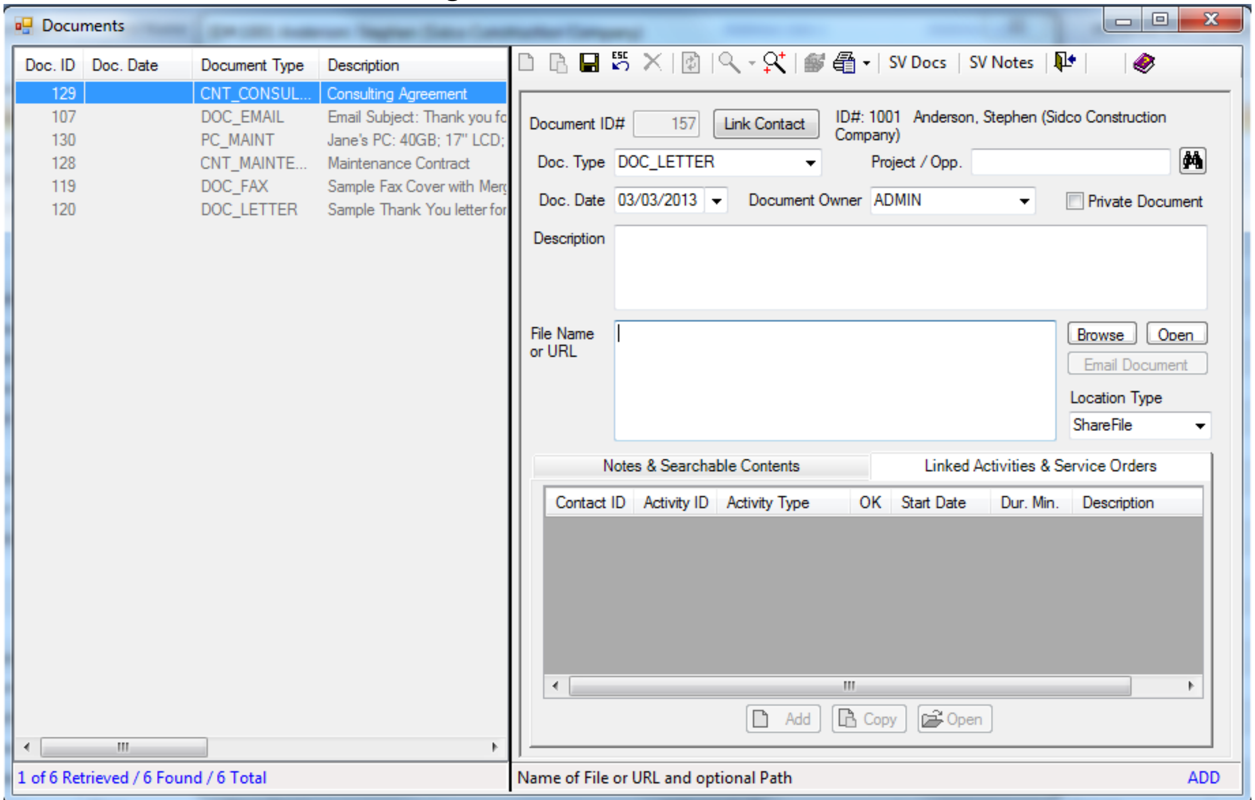
Figure 192: Contacts Screen: Documents/Links Tab



3. Click the **Add** button.

4. The **Documents** screen will appear with the Link Contact information. **Note:** Documents already associated with this Contact will appear in a grid on the left side of the screen.

Figure 193: Documents Screen



5. Choose an appropriate **Document Type.**

6. If applicable, choose to link the document to a **Project or Sales Opportunity** by clicking the binocular icon.

7. The **Doc Date** will default to today's date. Change this field if necessary.

8. Type in a **Description** of the Document.

9. Copy the URL into the Filed Name or URL box OR click the **Browse** button to locate and select the file you wish to link to Results.

10. In the **Location Type** field, select "ShareFile".

11. Click the icon to save the record.

12. Close the screen. The new document will appear under the **Docs/Link** tab of the appropriate contact.

Reports

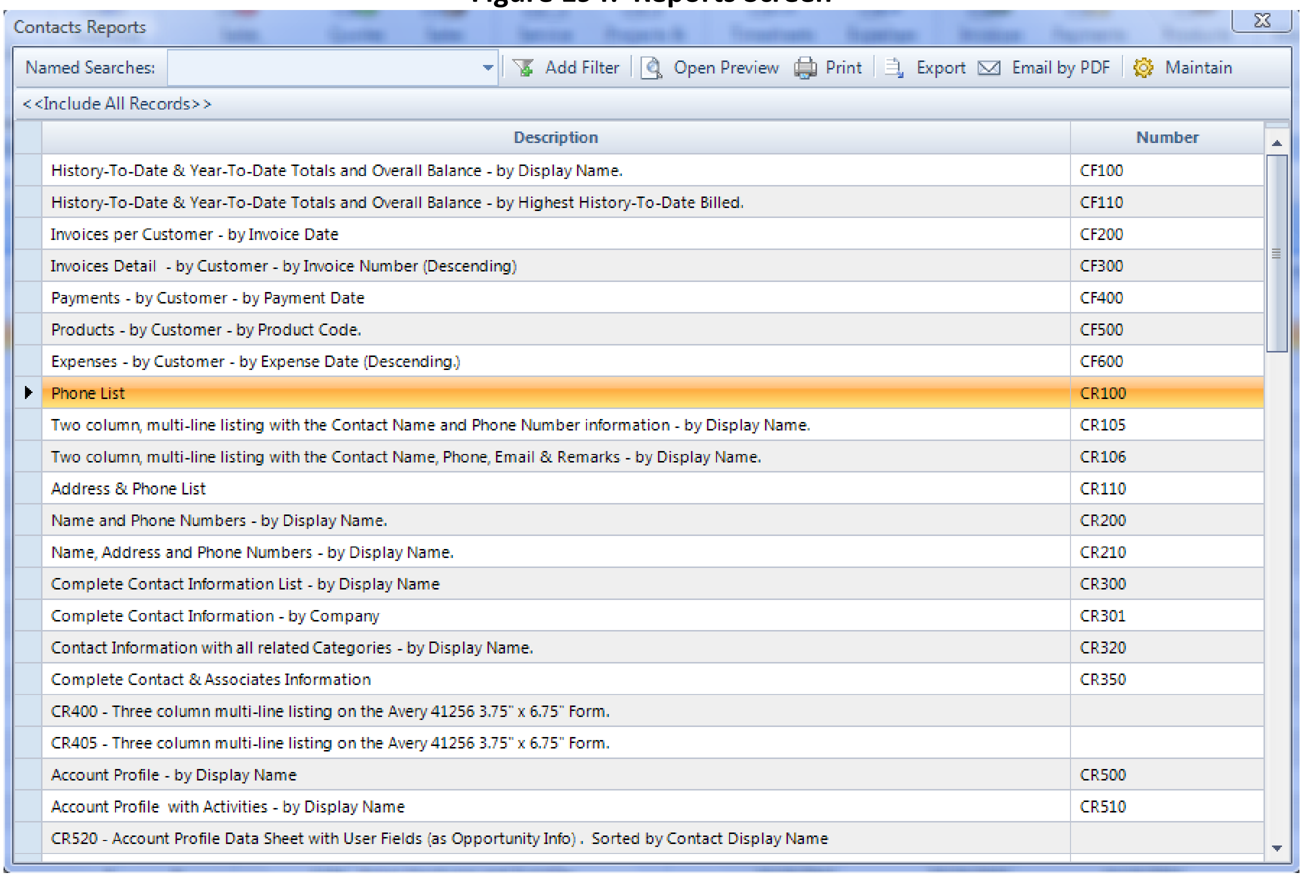
Each module within Results offers a set of standard reports.

How to Preview or Print a Report

1. On the **Reports** tab, select the type of report you would like to access.

2. Highlight the desired report.

Figure 194: Reports Screen

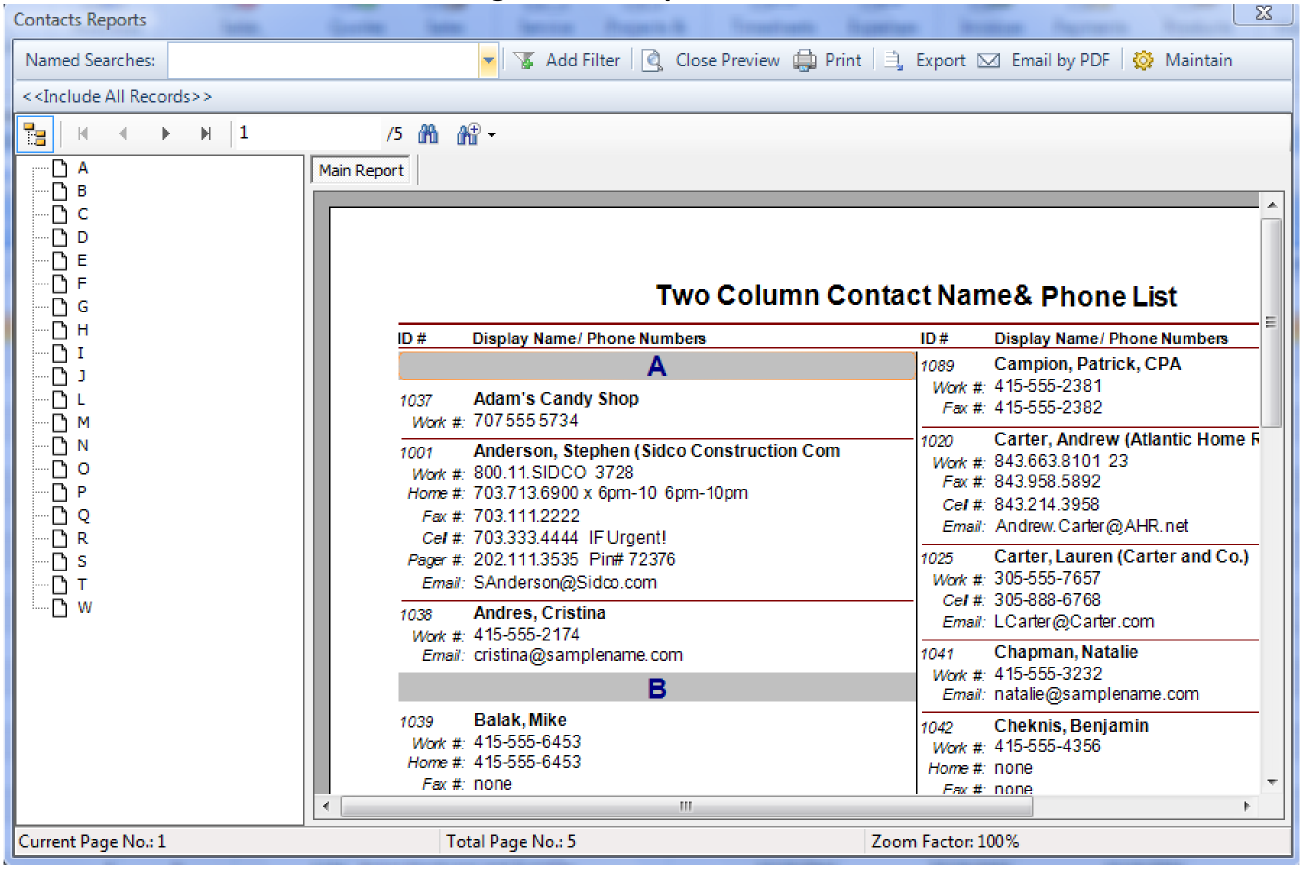


Description	Number
History-To-Date & Year-To-Date Totals and Overall Balance - by Display Name.	CF100
History-To-Date & Year-To-Date Totals and Overall Balance - by Highest History-To-Date Billed.	CF110
Invoices per Customer - by Invoice Date	CF200
Invoices Detail - by Customer - by Invoice Number (Descending)	CF300
Payments - by Customer - by Payment Date	CF400
Products - by Customer - by Product Code.	CF500
Expenses - by Customer - by Expense Date (Descending.)	CF600
Phone List	CR100
Two column, multi-line listing with the Contact Name and Phone Number information - by Display Name.	CR105
Two column, multi-line listing with the Contact Name, Phone, Email & Remarks - by Display Name.	CR106
Address & Phone List	CR110
Name and Phone Numbers - by Display Name.	CR200
Name, Address and Phone Numbers - by Display Name.	CR210
Complete Contact Information List - by Display Name	CR300
Complete Contact Information - by Company	CR301
Contact Information with all related Categories - by Display Name.	CR320
Complete Contact & Associates Information	CR350
CR400 - Three column multi-line listing on the Avery 41256 3.75" x 6.75" Form.	
CR405 - Three column multi-line listing on the Avery 41256 3.75" x 6.75" Form.	
Account Profile - by Display Name	CR500
Account Profile with Activities - by Display Name	CR510
CR520 - Account Profile Data Sheet with User Fields (as Opportunity Info) . Sorted by Contact Display Name	

3. To select certain criteria for your report, select a **Named Search** from the list displayed at the top of the screen. Refer to *Named Searches* for more information on this topic.

4. To preview the report, before outputting it, click on the **Open Preview** button:

Figure 195: Report Preview



OR

To output the Report, click on the **Print** button, **Email as PDF** button or the **Export** button.

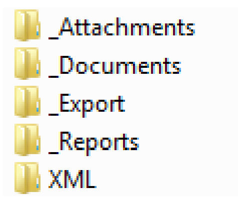
Results Folders and Your Backup Strategy

How to Backup Results

1. Ensure all users are logged out of Results.

2. Navigate to the Results Data folder (usually found under the Results drive on your network).

3. Save the files in the Results Data Folder and the following five folders to your backup device:



Note: For the Results Small Business edition, the .mdb file is your main database file. If you are using the Results Enterprise Edition, you will need to back up the SQL database file, as well. Refer to your SQL manual for instructions on how to back up SQL files.

Organizing Your INI Files

Each Results User will typically have their own INI file. An INI file, or configuration file, stores information about each user's individual preferences. We recommend storing all of the INI files in your Results Data Folder.

Importing Data

From QuickBooks

If you use QuickBooks, you will want to import your QuickBooks files before importing any other type of file.

Once your initial setup is complete (refer to the QuickBooks User Manual), you must synchronize Results and QuickBooks data on a regular basis.

To Import from QuickBooks:

1. On the Results menu, on the **Finances** tab, in the **External** group, select **QuickBooks Synchronization**.

2. Select the items in the left hand column that you would like to import.

3. Click the **Synchronize All Selected Items** button.

From Outlook

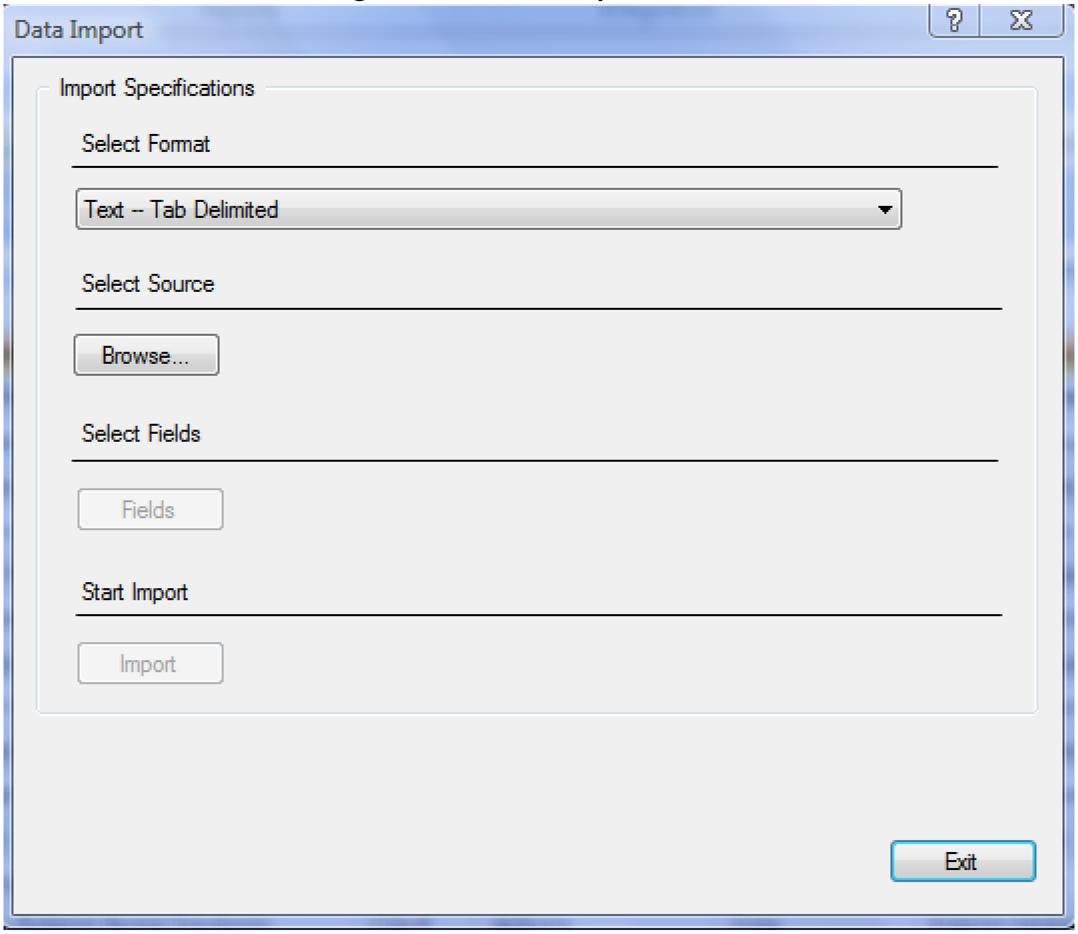
Please refer to the Outlook Integration Chapter.

From Other Sources

To Import Contacts:

1. On the **Contacts** tab, in the **Integration** group, click **Import**. The Data Import screen displays.

Figure 196: Data Import Screen

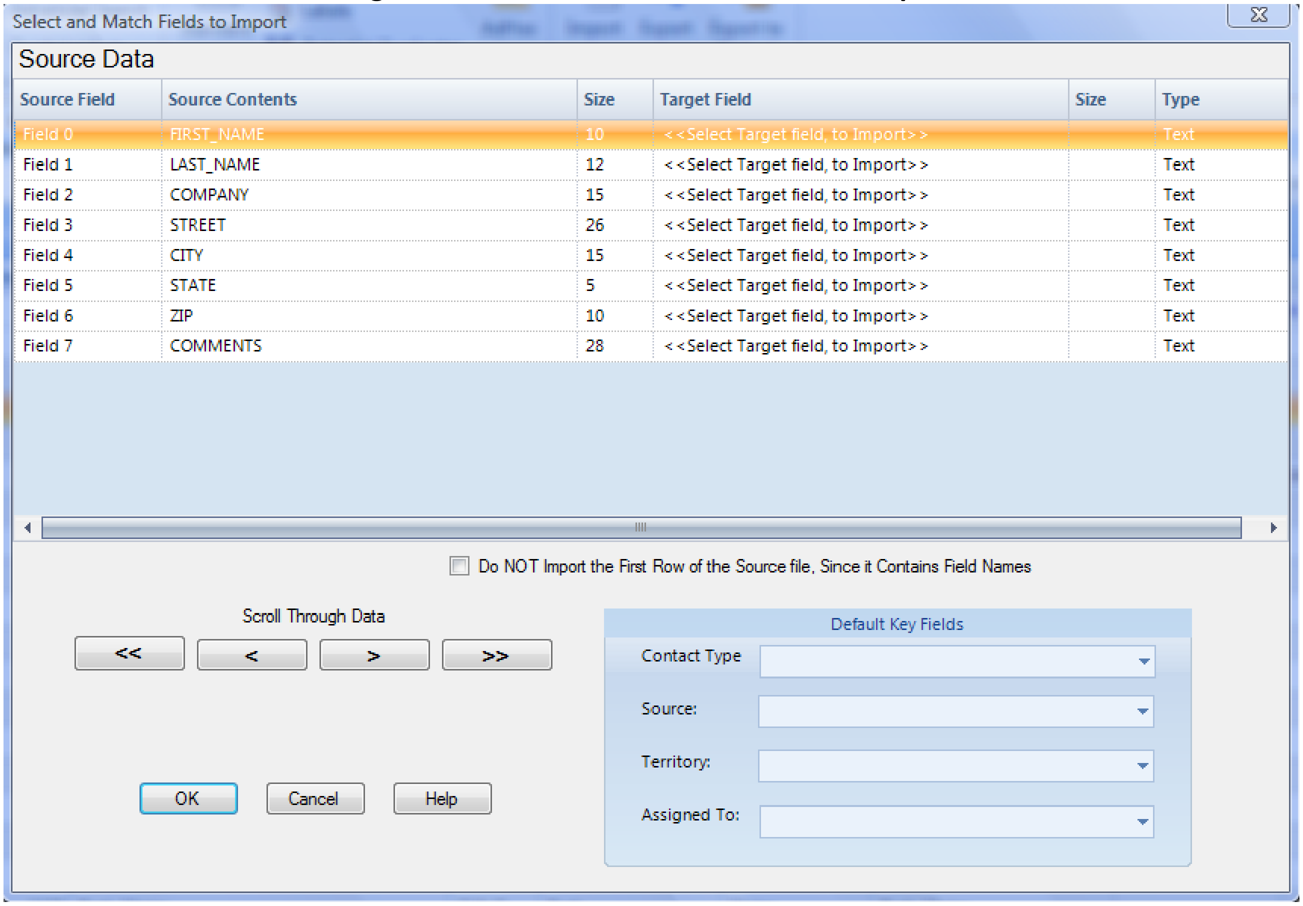


2. Select a format for the file you are about to import.

3. Click the **Browse** button and choose the file you wish to import. **Note:** When a source is selected, its path will be displayed.

4. Click the **Fields** button to select the fields for import. The following screen displays.

Figure 197: Select and Match Fields to Import



5. In the **Target Field** column, select a value from the drop-down list for each row that you wish to import. Not every field in the Source file needs to be matched to a field in the *Target Field* drop-down. For example, only three Target fields may be matched to a Source file with twelve fields.

Warning: It is critical that the Source data and the Target data fields are correctly matched.

6. Fill out the information in the "Default Key Fields" box in the bottom right corner.

7. Click "**OK**".

8. Click the **Import** button.

Warning: Before importing records it is strongly recommended, but not required, that all users be logged off of the system. In addition, it is always a good idea to make a backup of your data before implementing major changes.

Exporting Data

To QuickBooks

Once your initial set up is complete (refer to the QuickBooks User Manual), you must synchronize Results and QuickBooks data on a regular basis.

To Export to QuickBooks:

1. On the **Finances** tab, in the **External** group, select **QuickBooks Synchronization**.
2. Select the items in the left hand column that you would like to import.
3. Click the **Synchronize All Selected Items** button.

To Excel

You can export to Excel from any Data Management Center (DMC) or from the Export module.

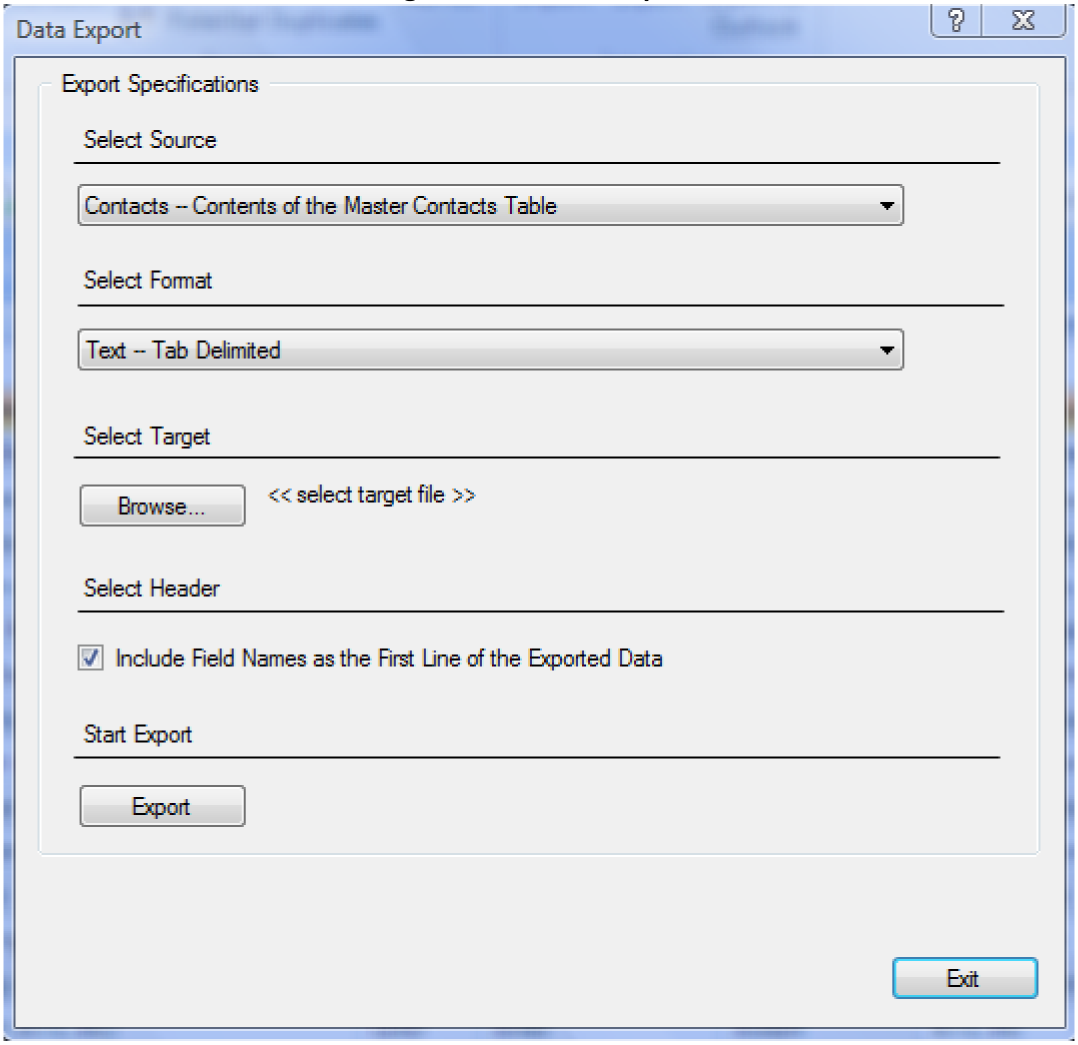
To Export from any DMC:

1. Navigate to any DMC and perform a search for your desired record set.
2. Click the **Export** button in the DMC toolbar. Under the Export dropdown, select the **Export to Excel** option.

To Export from the Export Module:

1. On the **Contacts** tab, in the **Integration** group, click **Export**. The following screen displays.

Figure 198: Data Export



2. Select the table of interest from the **Select Source** drop down.

3. Select the file type from the **Select Format** drop down.

4. Select the location by clicking the **Select Target** button.

5. Select whether or not you want the Field Names to be displayed in the first line of your file.

6. Click the **Export** button.

7. You can now open that CSV file in Excel and manipulate the data directly.

To Outlook

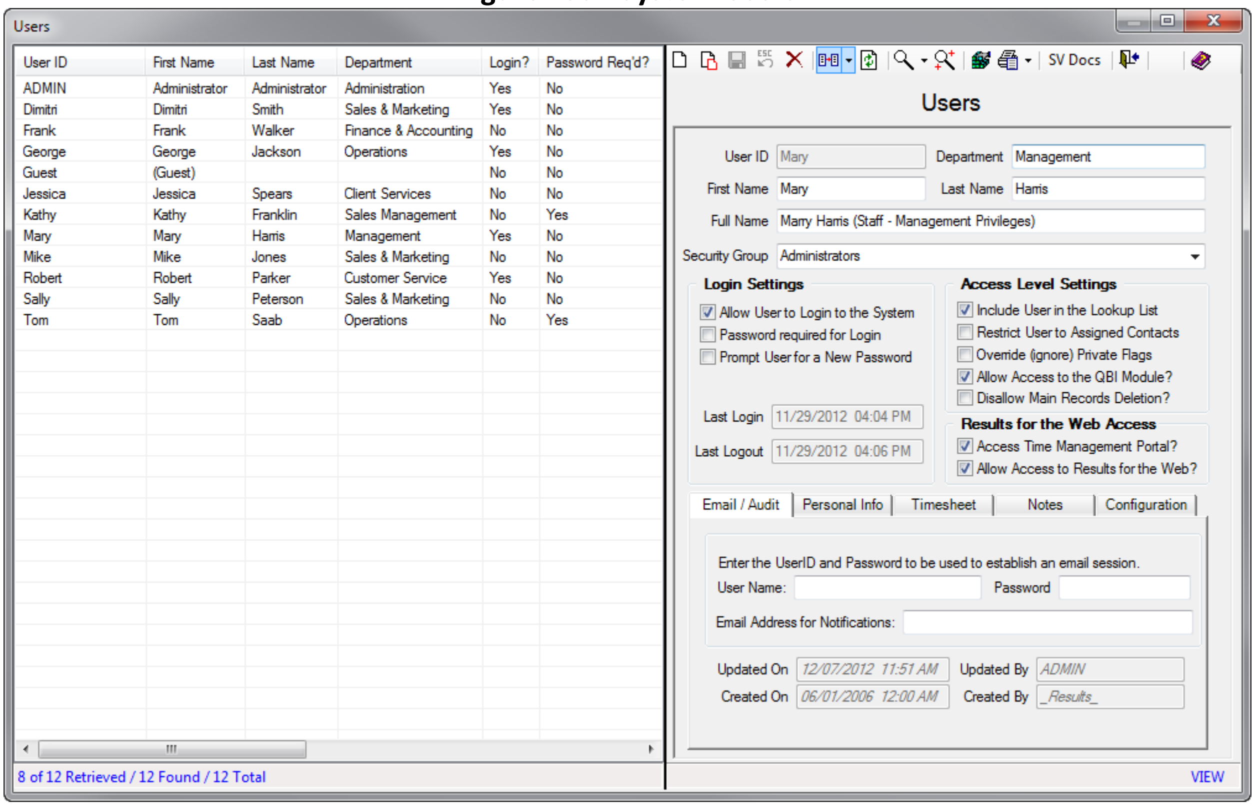
You can export contacts and calendar entries from Results to Outlook. Please refer to the Outlook Integration Chapter.

User Accounts

Adding Users

1. On the **Setup** tab, in the **Security** group, click **Users**. The following screen displays.

Figure 199: System Users



2. The grid on the left side of the screen displays all of the current users. To add a new user, click the **Add** icon.

3. Fill in the following fields:
   a. User ID
   b. Department
   c. First Name
   d. Last Name
   e. Full Name
   f. Default Security Group (**Note:** For Security, this field is defaulted to "All_Users" which does not have access to any modules.)

Figure 200: Security Group Access Rights

Security Groups	Contacts	Calendar	Document Mgmt	Sales Opp.	Quotes	Projects	Imports/Exports	Service Orders	Expenses	Timesheets	Invoices	Payments	Mass Invoicing	Security Maint.	Look Up Tables
All_Users															
Guests	VO	VO													
Staff_Office	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA					
Staff_Financial	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA		
Management	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA		FA
Administrators	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA	FA

VO = View Only
FA = Full Access

4. Check the appropriate boxes under Login Settings:
    a. **Allow User to Login to the System**: determines whether or not the user has permission to access the system. For example, a staff member that is no longer with the company will have their record unchecked to deactivate their account.
    b. **Password Required for Login:** determines whether or not the password field is allowed to be blank upon login.

Warning: If the *Password Required for Login* field is unchecked, then anyone can access the program data.

    c. **Prompt User for a New Password:** determines whether or not a new password prompt is displayed the next time the user logs into the system. (**Note**: If the *Password Required for Login* setting is unchecked, then a new password prompt will never be issued.)

5. Check the appropriate boxes under Access Level Settings:
    a. **Include User in the Lookup List**
    b. **Restrict User to Assigned Contacts**
    c. **Override (ignore) Private Flags**: allows managers to see all of the records, including those marked as private.
    d. **Allow access to the QBI Module**
    e. **Allow access to Time Management Portal**: allow user to access to the Time Management Portal (optional add-on).
    f. **Allow access to the Results for the Web**: allow user the same functionality using Results for the Web (RforW – R4W) as with the Windows version.

6. Fill out information on the **Email/Audit** tab:
    a. If the default email client requires a user name and password, then it is recommended that they be specified in this section to prevent a log on prompt from

being displayed each time Results attempts to establish a session with the email client.

   i. **User Name:** the user name required to log on to the email client
   ii. **Password:** the password required to log on to the email client.

b. **Email Address for Notifications:** the default email address to use when contacting this user by email from Results.

7. Fill out information on the **Personal Info** tab:
   a. Hired On
   b. Departed On
   c. Date-of-Birth
   d. Hourly Rate
   e. SSN
   f. Commission: commission amount for sales used when a user is assigned to an invoice or an item on the invoice.
   g. Year Sales Quota
   h. Employee Contact Record: link the user record to the corresponding Employee Contact record. This is required to export employee timesheets into QuickBooks.

8. If this user will be using the timesheet module, fill out information on the **Timesheet** tab. (Refer to the **Timesheet Module** for more information.)

9. Fill out the **Notes** tab to document any other miscellaneous information about the user.

The **Configuration** tab is designed for the System Administrator and stores each user's personal preferences from the Configuration Options screen as well as the general use of the system. System Administrators can edit the contents on this tab after confirming that the corresponding user is logged out of Results. If the corresponding user is logged into Results when edits are made, the changes will be eliminated when the user exits Results.

10. Click the **Save** icon.

Resetting a User Password:

1. On the **Setup** tab, in the **Security** group, click **Users**. The **Users** screen displays.

2. Select the appropriate user from the left hand grid.

3. Under Login Settings, check **Prompt User for New Password**.

4. The next time that user logs in, they will be prompted for a new password.

Disabling a Current User

1. On the **Setup** tab, in the **Security** group, click **Users**.

2. Select the appropriate user from the left hand grid.

3. Under Login Settings, uncheck **Allow User to Login to System**.

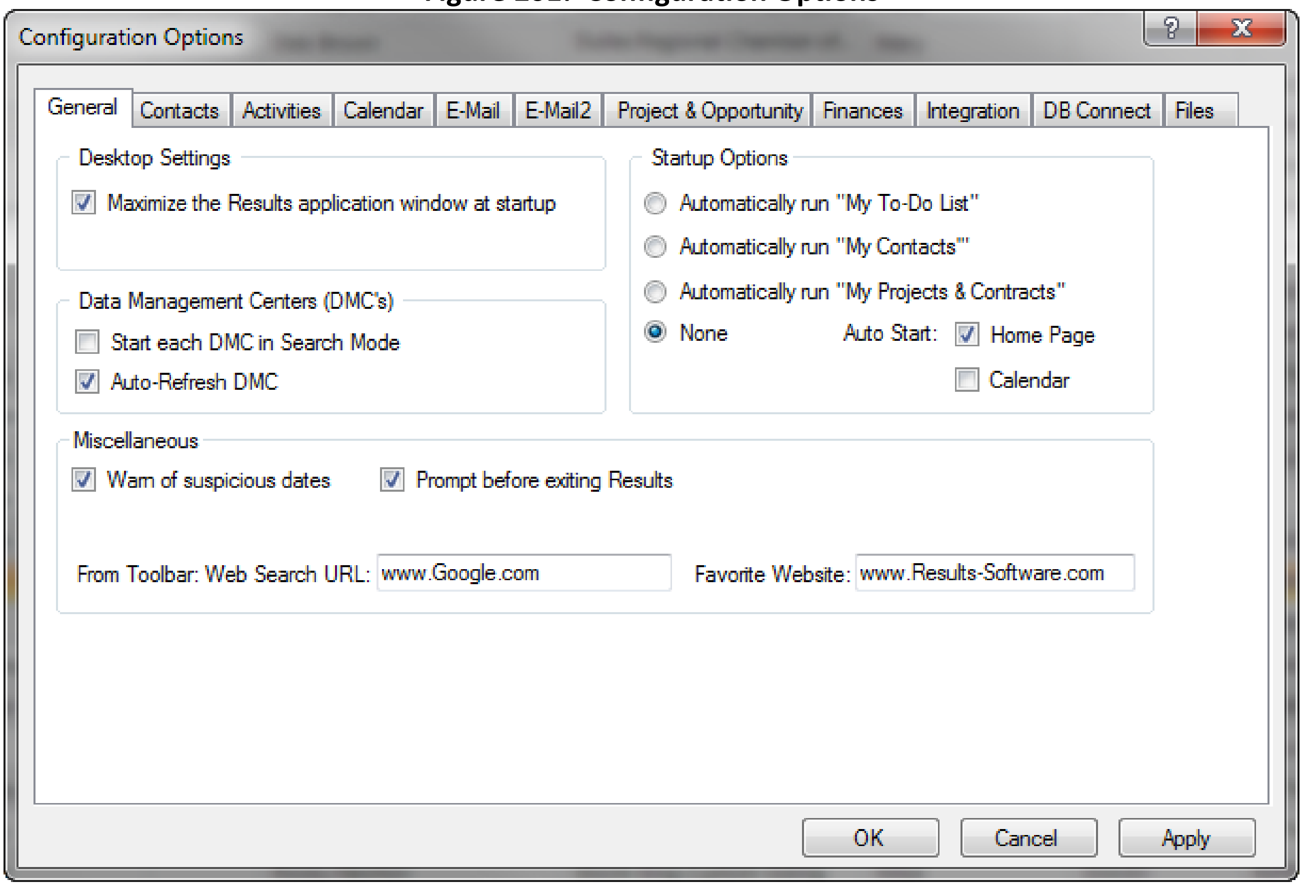
Configuration Options

Using the configuration screen, each user can change the preferences and settings associated with their own User Account.

Getting Familiar with the Configuration Screen

5. On the **Tools** tab, in the **Configuration** group, select **Options**. The following screen displays.

Figure 201: Configuration Options



6. Each tab of the Configuration Options screen allows you to customize different features and components of the system. The following table highlights some of the available options:

Tab	Highlights of the Configuration Options:
General	• Choose to display Navigation Menu • Identify the User ID to default on the logon screen • Identify the number of records displayed in a DMC • Change the background of the screen • Set the default Web Search URL and Favorite Website

Tab	Highlights of the Configuration Options:
Contacts	• Choose the default tab on the Contacts screen • Default "Assigned To" field to the User • Set important **Required Fields**
Activities	• Select default Activity Types • Choose the default tab on the Activity Detail screen • Check important **Conflict Resolution**
Calendar	• Select the default Activity Type for calendar entries • Select the start time for each day
Email	• Select Outlook as your email client • Select the default Activity Type for sent and received Emails
Email 2	• Select HTML vs. Plain Text • Select options as email signatures and other defaults • Choose if you can edit activity after creation
Projects & Opportunities	• Select the default template for Project Code and Sales Opportunity Codes • Select the default Project and Sales Opportunity Status, Type and Stage • Set Defaults for Timesheet
Finances	• Customize the Header and Footers of various reports • Set default credit limits and terms for Contact records • Customize email subjects and titles for Invoices and Quotes • Set user's Rapid Add Default Entry Method
Integration	• Setup SmartVault Integration • Setup Constant Contact Integration • Setup ShareFile Integration
DB Connect	• Identify the type of data connection and related attributes • Identify the SQL Database Connection Settings or Custom SQL Connection String
Files	• Identify file path directories for various components

7. Make your changes and click the **Apply** button. **Note:** Some changes may not take effect until the next time you login to Results.

Named Searches

A Named Search allows users to save regularly used search criteria within Results. A Named Search allows you to search on any combination of fields from within Results. Here are some examples of Named Searches:

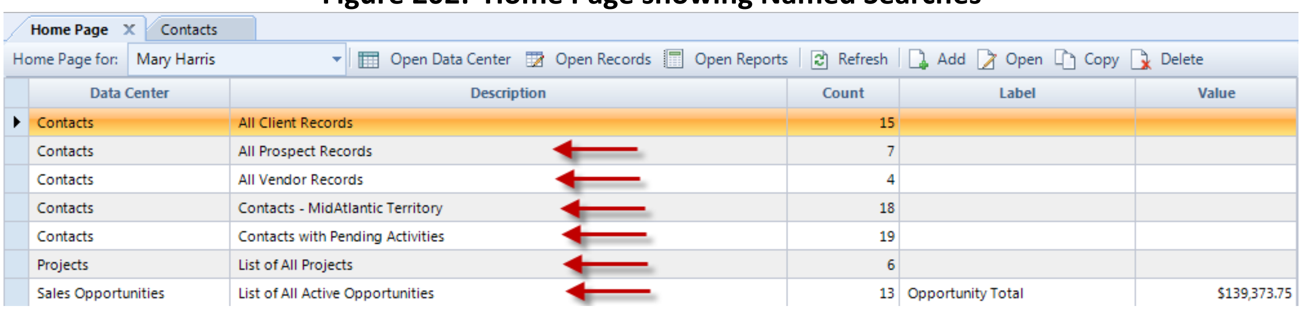
- How many customers have overdue invoices?
- How many customers live in the DC area?
- Contacts Assigned to Mike
- Contacts within a certain zip code

Viewing Named Searches

After created, a Named Search is available from the following areas:

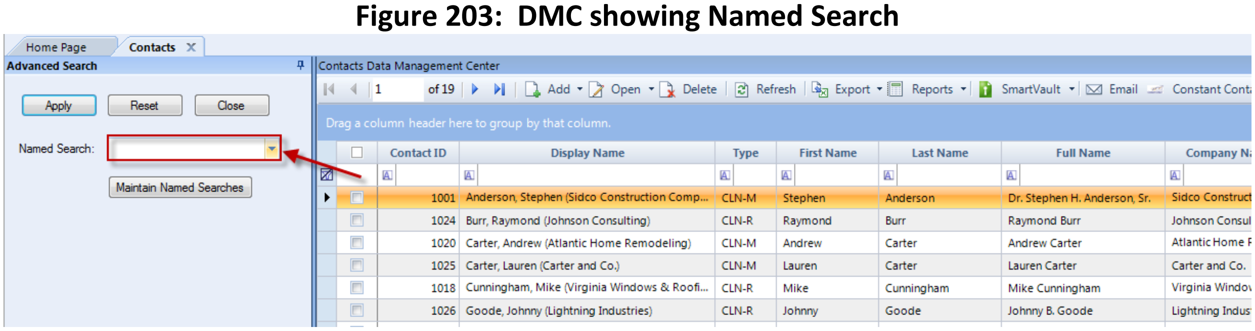
From the Home Page

Figure 202: Home Page showing Named Searches



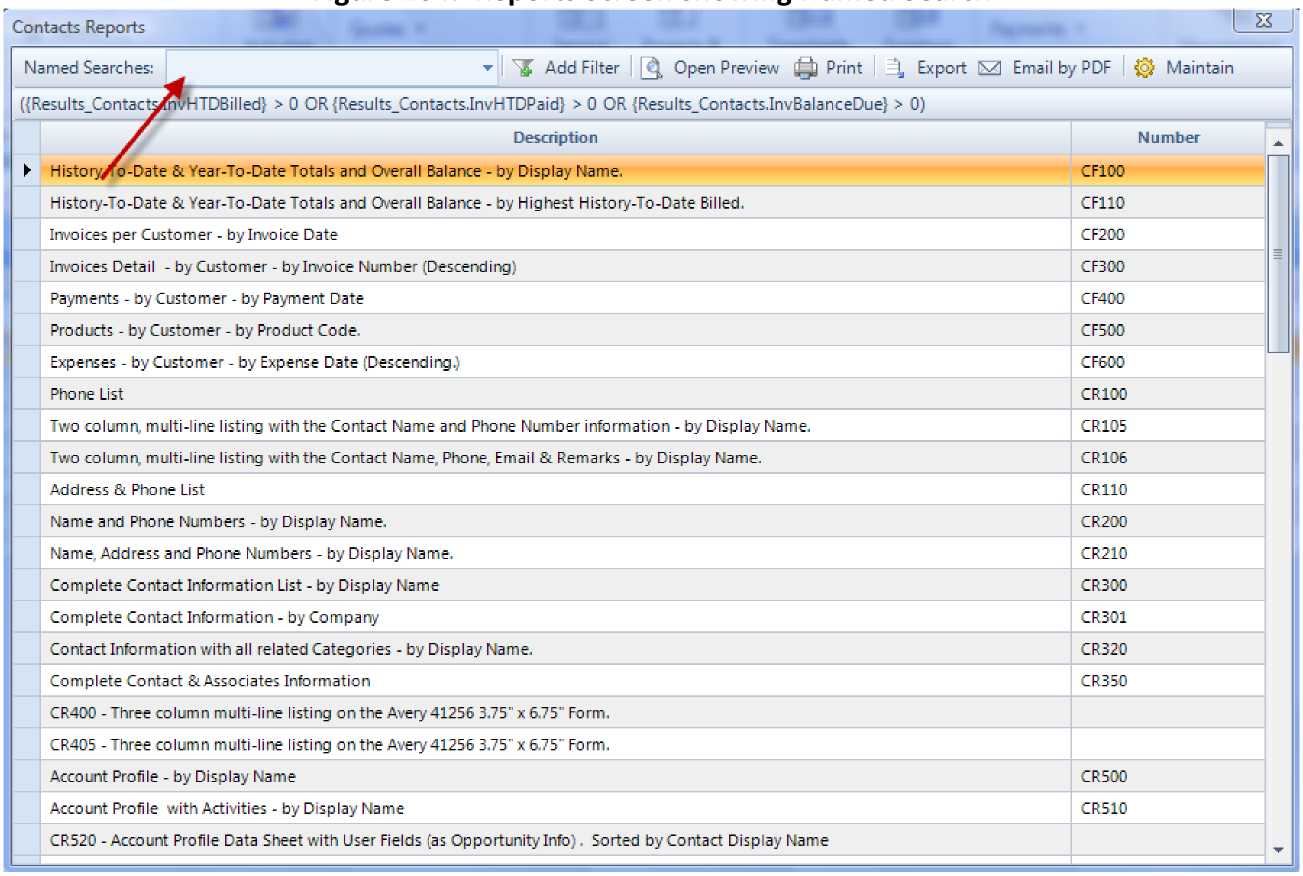
From Each DMC

Figure 203: DMC showing Named Search



From any Reports Menu

Figure 204: Reports Screen showing Named Search

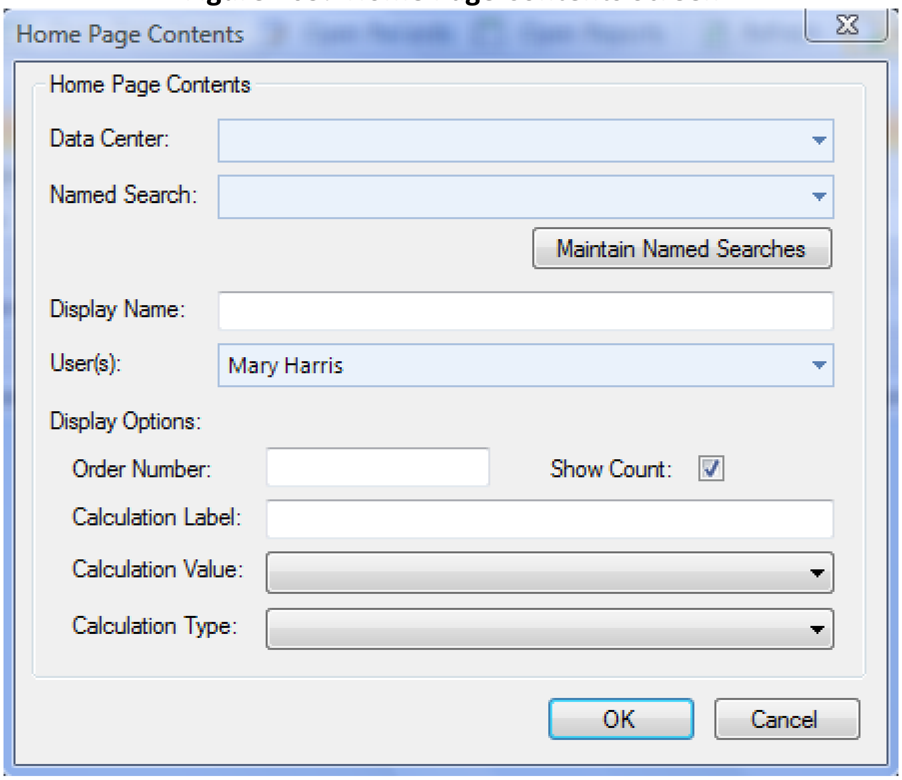


Creating Named Searches

From the Home Page

1. From the **Home Page**, select the **Add** button on Home Page toolbar. The **Home Page Contents** screen displays.

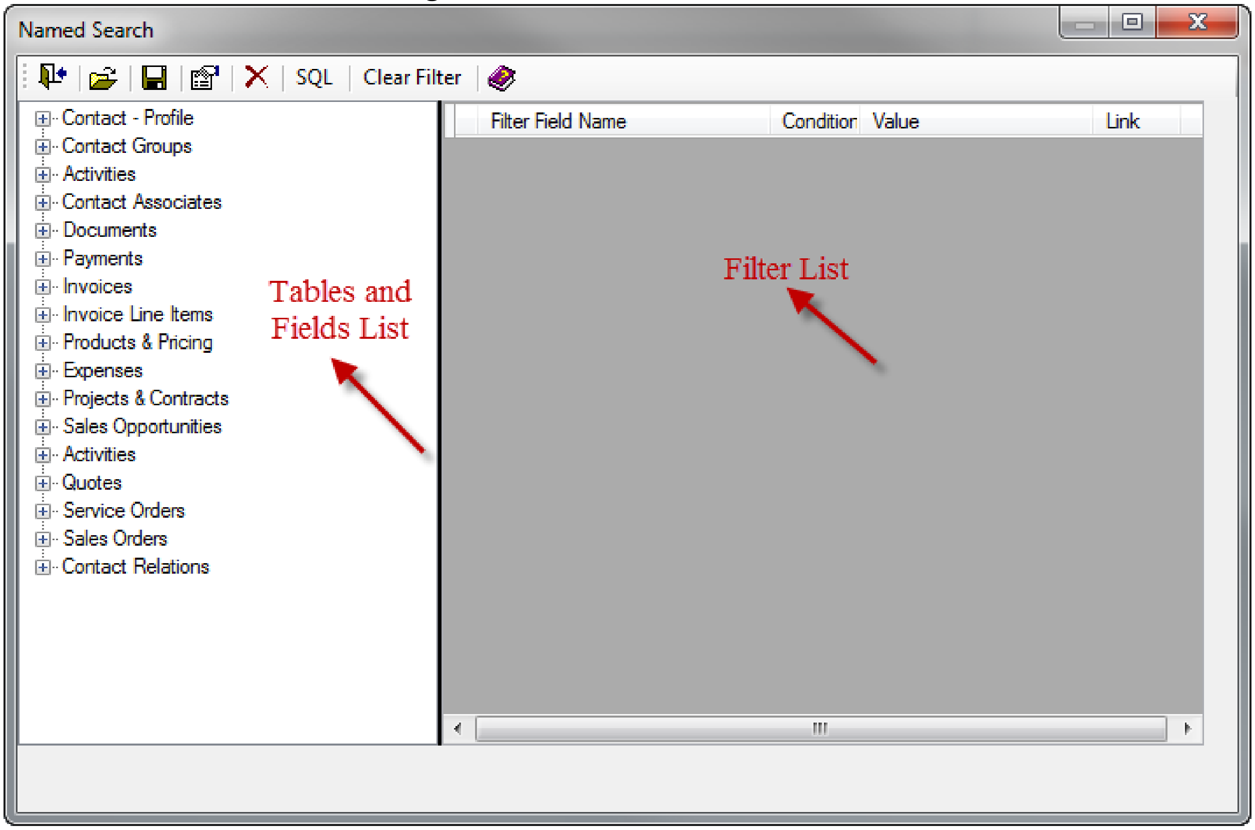
Figure 205: Home Page Contents Screen



2. Select the **Data Center** from which you would like to pull information.

3. Select the **Maintain Named Search** button. The following screen displays.

Figure 206: Named Search Screen



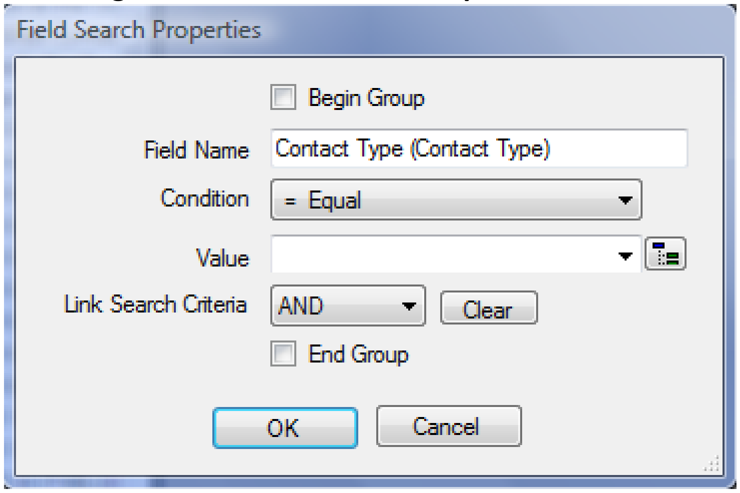
The **Named Search** screen is divided into two sections:

- **The Table & Field List**: Shows all the relational tables that apply to this Data Center and their associated searchable fields. **Note:** Double-clicking a field, adds the field to the Filter List.
- **The Filter List:** The list that will be used to specify the filter criteria.

4. Double-click an entry in the Table & Field List (left grid) to display all of the fields under that section. Double-click the fields you would like added to the Filter List.

5. To apply conditions to the fields in the Filter List, double-click on each entry. The Field Search Properties screen displays.

Figure 207: Field Search Properties Screen



6. Select the **Condition** (i.e. Equal, Less Than, Greater Than, etc.) and **Value** you would like applied to the field.

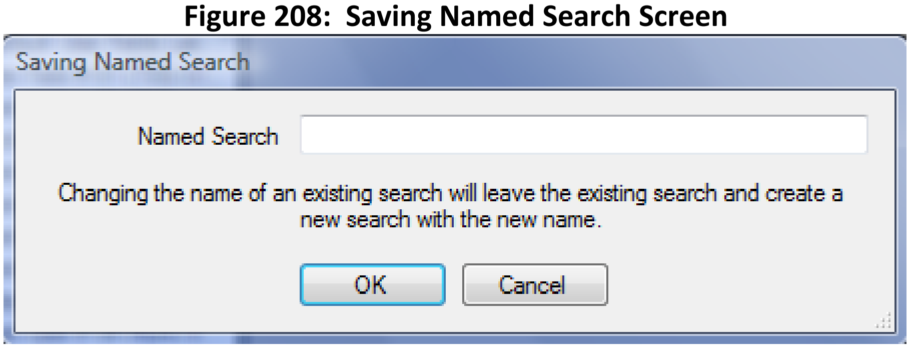
7. As in an arithmetic equation, when you combine different searches, you will need to enclose them in parentheses, which is done with the **Begin Group** and **End Group**. Therefore, if this is the beginning or end of a group of related fields, select the **Begin Group** or **End Group.** Otherwise, leave these fields blank.

8. Click **OK.**

9. Repeat Steps 4-8 as necessary to complete your equation. (For more guidance, refer to the **Named Search Examples** section below.)

10. Click the **Save** icon to save the search criteria for later use.

Figure 208: Saving Named Search Screen



11. Type a unique name for your saved criteria, which will help you easily identify it later. Click the **OK** button.

12. You will be returned to the **Named Search** screen. Close out of this screen to return to the **Home Page Contents** screen.

13. Select your recently saved Named Search from the **Named Search** field.

14. If desired, edit the **Display Name** of the Named Search that you would like to appear on your Home Page.

15. Select to have the Home Page displayed for either a single user or for All Users.

16. If desired, fill out the **Display Options** fields.

17. Click the **OK** button.

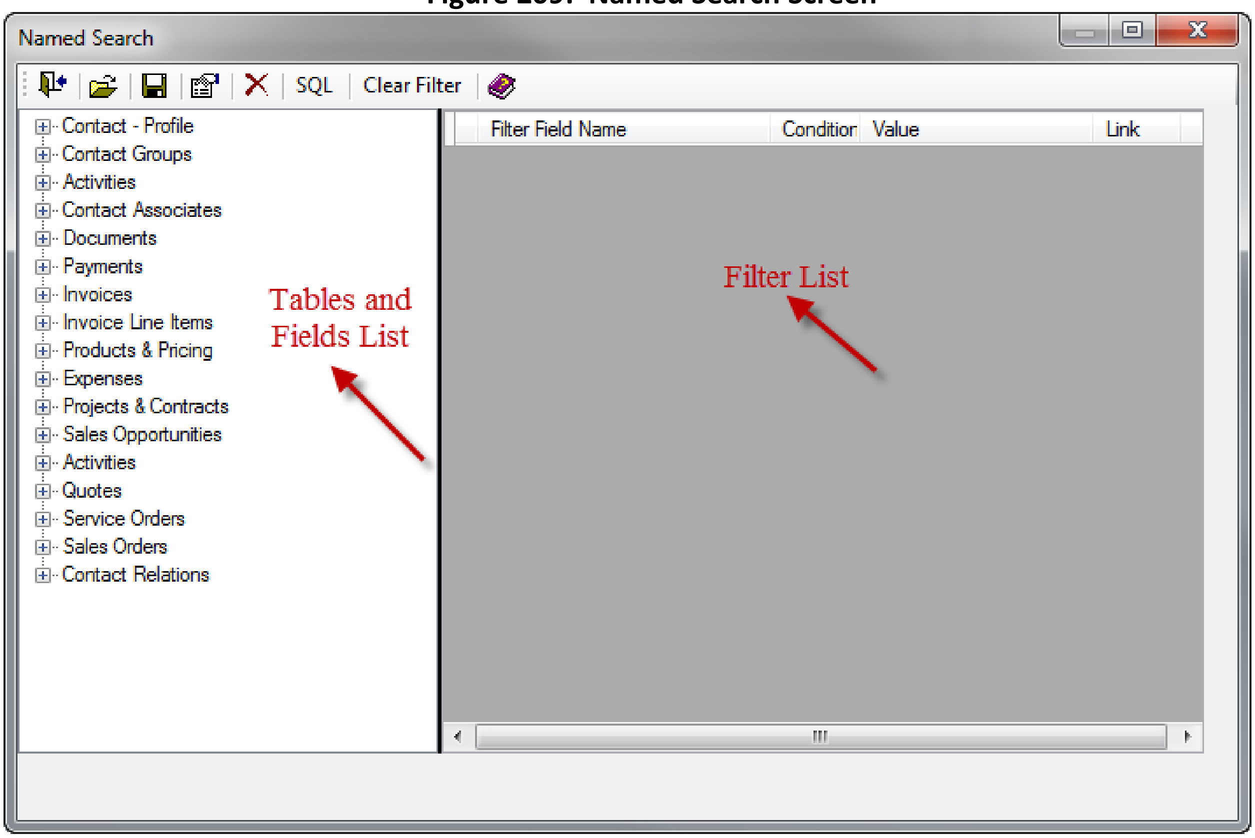
From a Data Management Center (DMC)

1. Open the appropriate Data Management Center.

2. Click the **Advanced Search** tab.

3. Click the **Maintain Named Search** button. The following screen displays.

Figure 209: Named Search Screen



The **Named Search** screen is divided into two sections:

- **The Table & Field List**: Shows all the relational tables that apply to this Data Center and their associated searchable fields. **Note:** Double-clicking a field, adds the field to the Filter List.
- **The Filter List:** The list used to specify the filter criteria.

4. Double-click an entry in the Tables & Field List (left grid) to display all of the fields under that section. Double-click the fields you would like added to the Filter List.

5. To apply conditions to the fields in the Filter List, double click on each entry. The following screen displays.

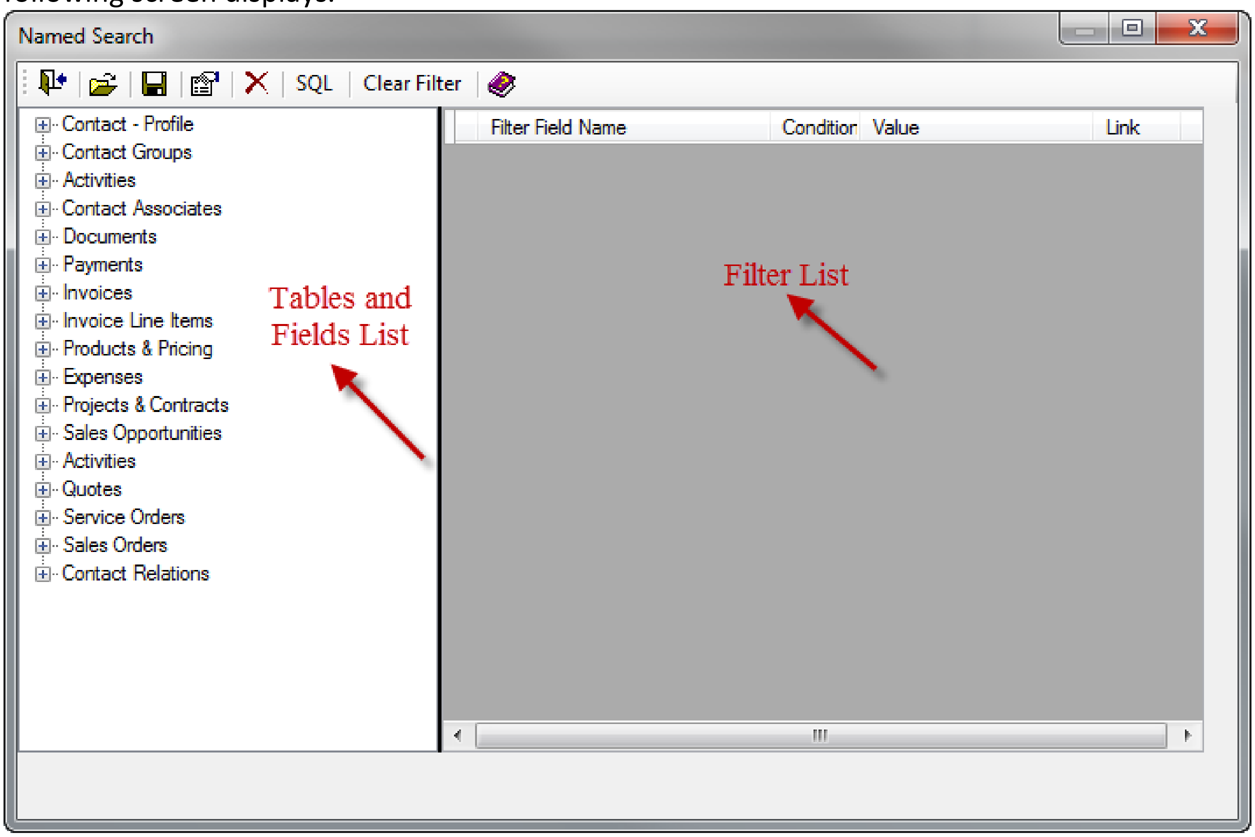
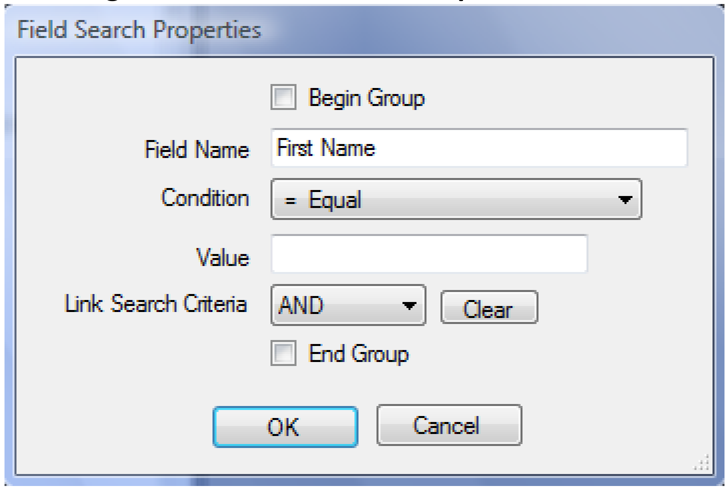


Figure 210: Field Search Properties Screen



6. Select the **Condition** (i.e. Equal, Less Than, Greater Than, etc.) and **Value** you would like applied to the field. In this example, you might want all Contact Types Equal to Major Clients or All Contact Types Equal to Vendors.

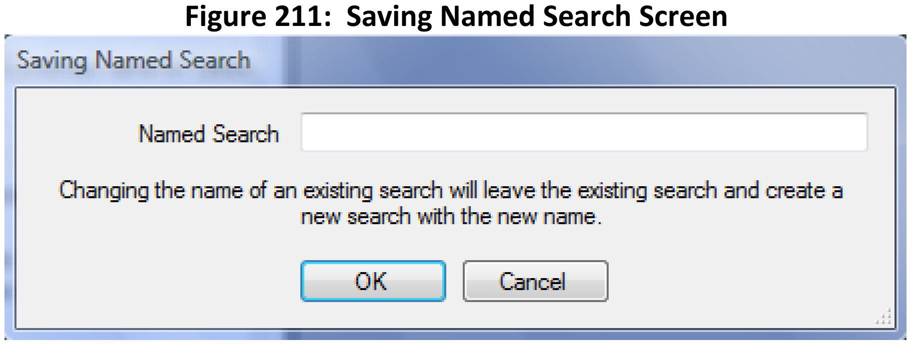
7. As in an arithmetic equation, when you combine different searches, you will need to enclose them in parentheses, which is done with the **Begin Group** and **End Group**. Therefore, if this is the beginning or end of a group of related fields, select the **Begin Group** or **End Group.** Otherwise, leave these fields blank.

8. Click **OK.**

9. Repeat Steps 4-8 as necessary to complete your equation. (For more guidance, refer to the **Named Search Examples** section below.)

10. Click the **Save** icon to save the search criteria for later use.

Figure 211: Saving Named Search Screen



11. Type a unique name for your saved criteria, which will help you easily identify it later Click the **OK** button.

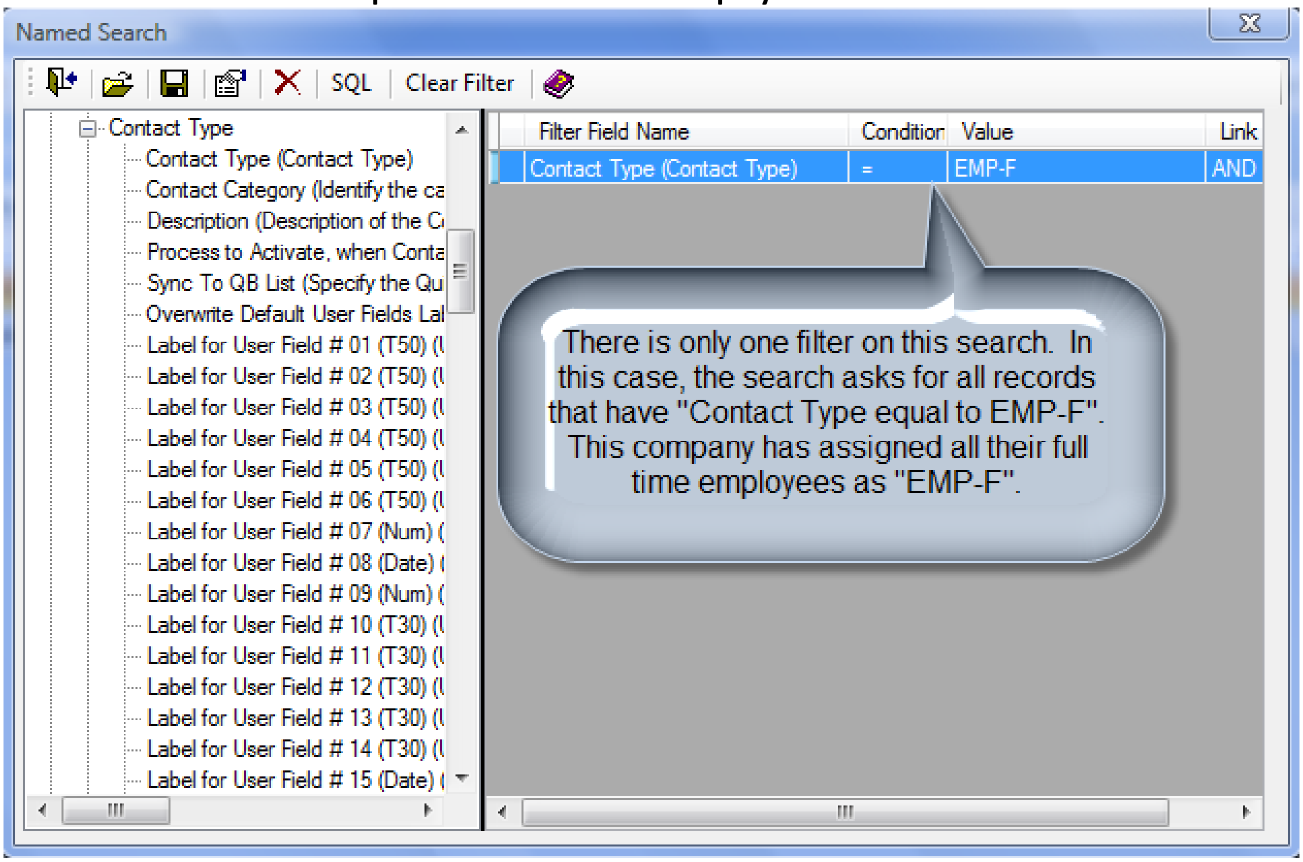
12. You will be returned to the **Named Search** screen. Close out of this screen to return to the DMC.

13. Your new Named Search will now be available from the **Named Search** list.

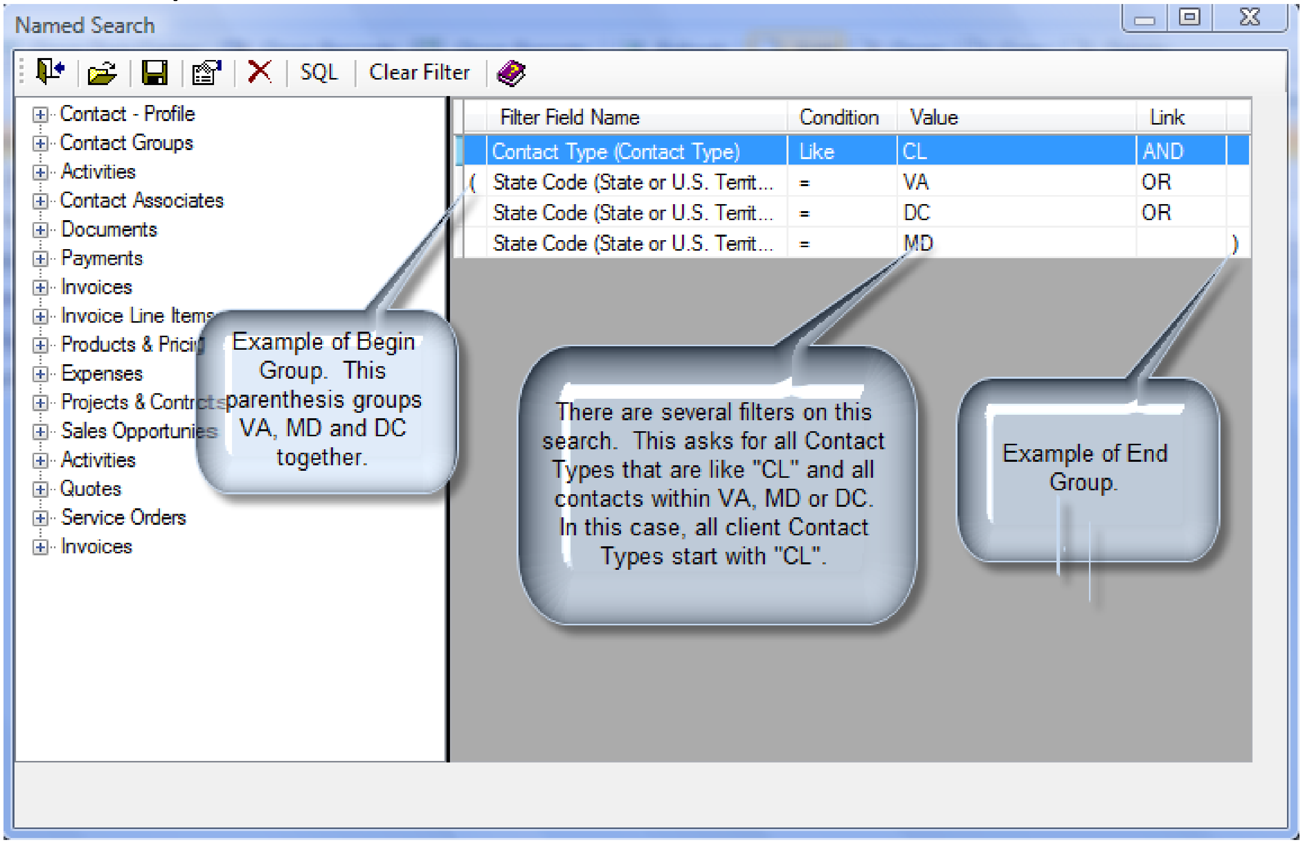
14. Click **Apply Search** to view the list of records meeting the search criteria.

Examples of Named Searches

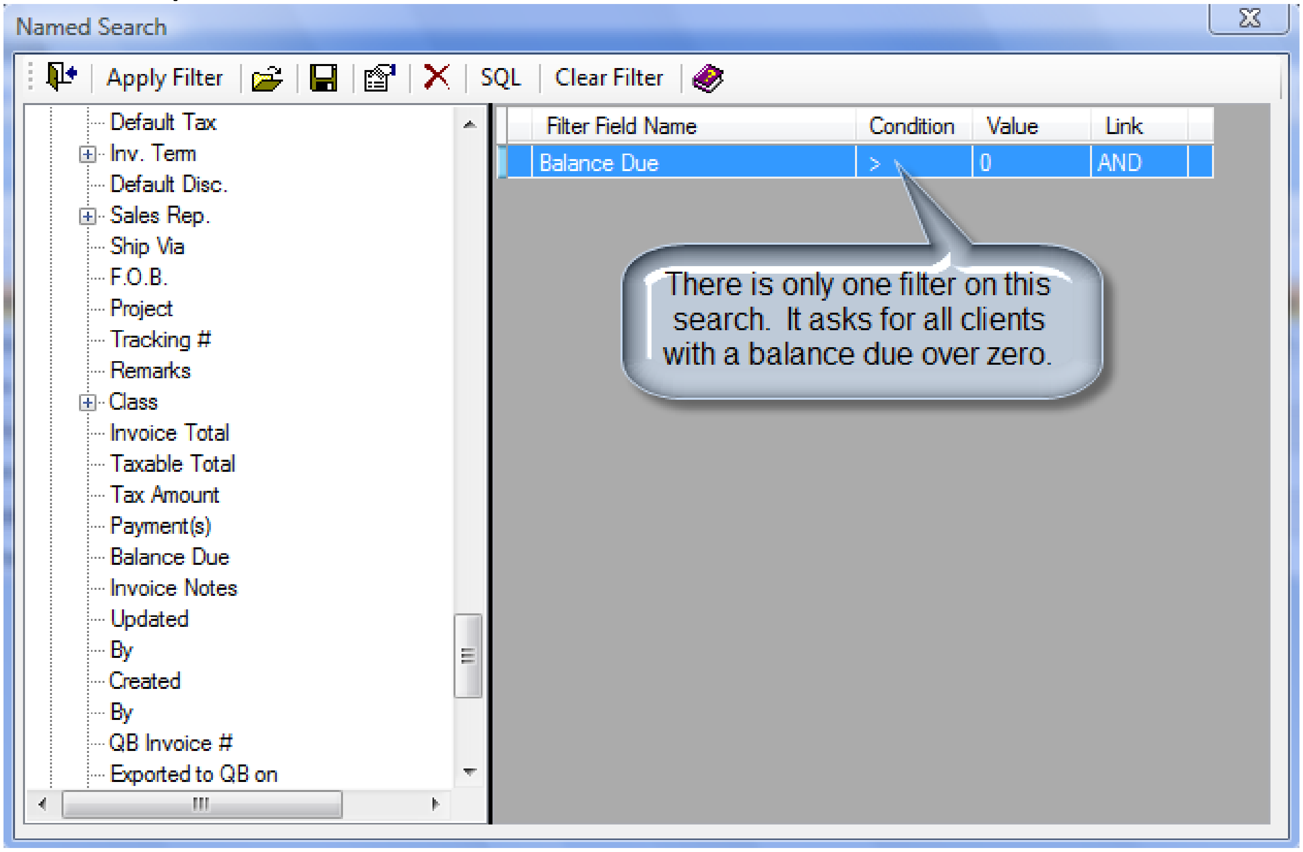
Named Search Example 1: List of Full Time Employees



Example 2: All Clients within the DC Area



Example 3: Clients with a Balance Due



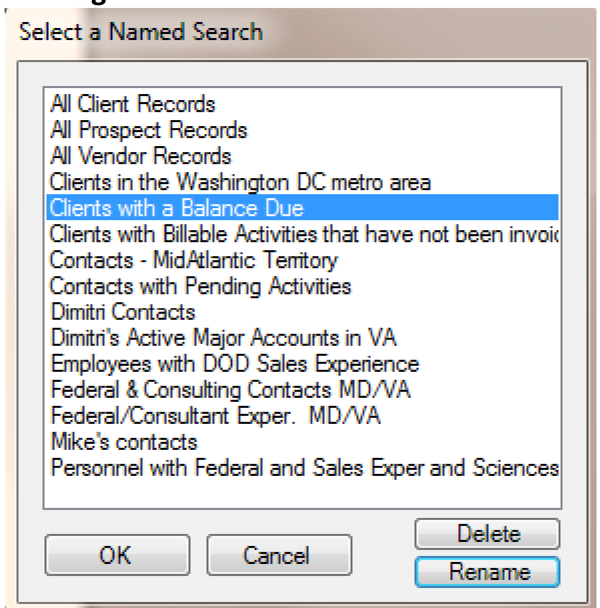
Editing a Named Search

1. Open the **Named Search** screen. (Refer to Creating a Named Search.)

2. Click the folder icon  on the toolbar to access a list of previously saved searches.

3. Select the Named Search from the available list.

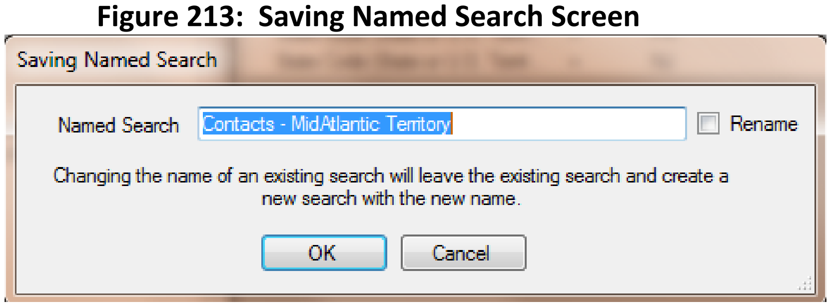
Figure 212: Select a Named Search



4. Double click on that Named Search and make necessary changes to the search criteria. (Refer to Creating a Named Search for instructions.)

5. Click the **Save** icon to save your changes. The following screen displays.

Figure 213: Saving Named Search Screen



6. To save the changes, click the **OK** button *OR* to create a brand new search with a new name, rename the search and click **OK** *OR* to give the existing search a new name, click the **Rename** option and enter the new name.

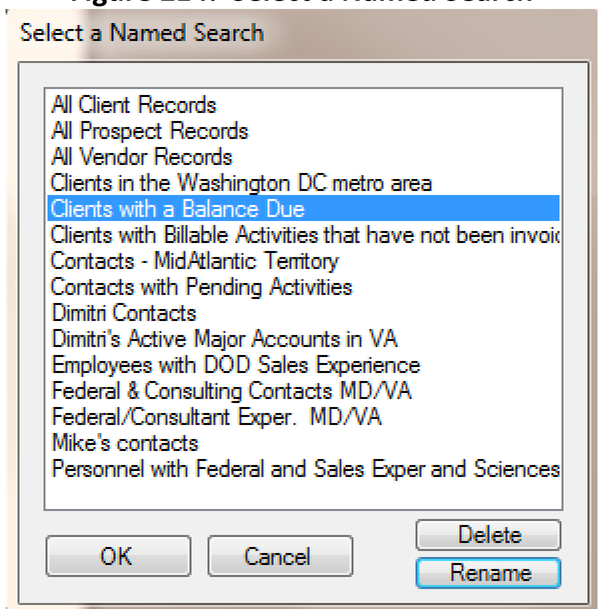
Renaming a Named Search

1. Open the **Named Search** screen. (Refer to [Creating a Named Search].)

2. Click the folder icon  on the toolbar to access a list of previously saved searches.

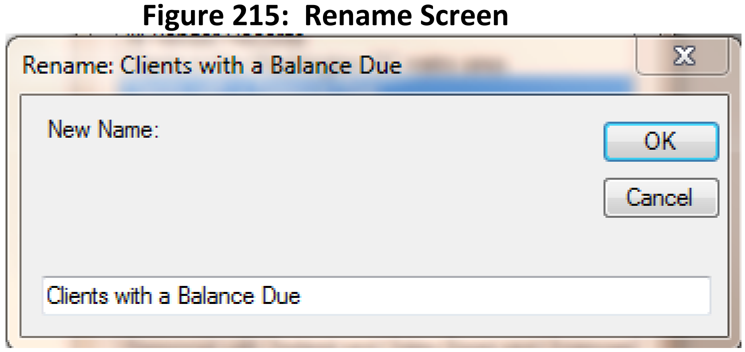
3. Select the Named Search from the available list.

Figure 214: Select a Named Search



4. Click the **Rename** button. The following screen displays.

Figure 215: Rename Screen



5. Rename the Named Search and click the OK button.

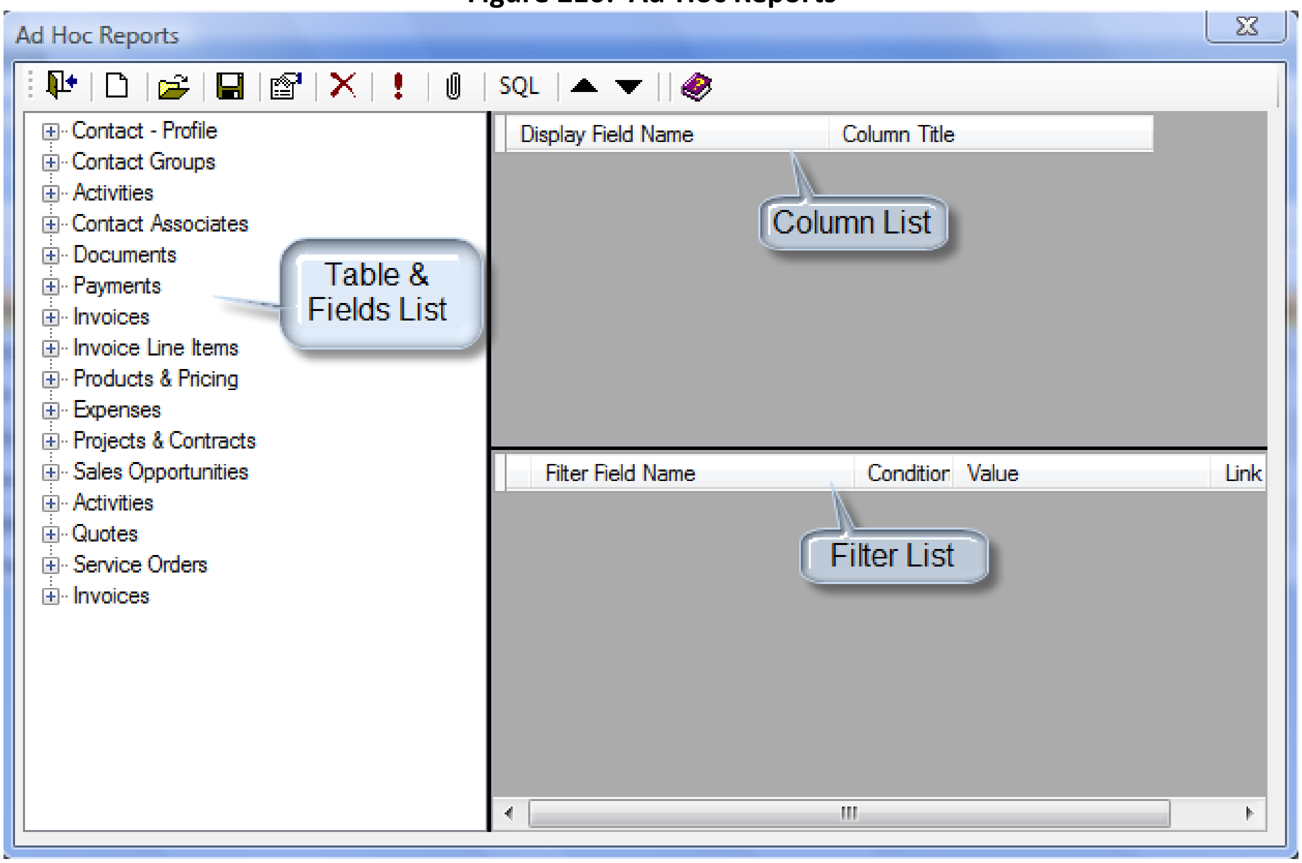
Ad-Hoc Reporting

Creating an Ad-Hoc Report

The Ad-Hoc Reports module uses the same engine as the Named Search engine. However, it also allows you to specify the fields that will be included in the Ad-Hoc Report.

1. On the **Reports** tab, point to the module in which you would like to create a report, select **Ad-Hoc.** The following screen displays.

Figure 216: Ad-Hoc Reports



The **Ad-Hoc Reports** screen is divided into three sections:

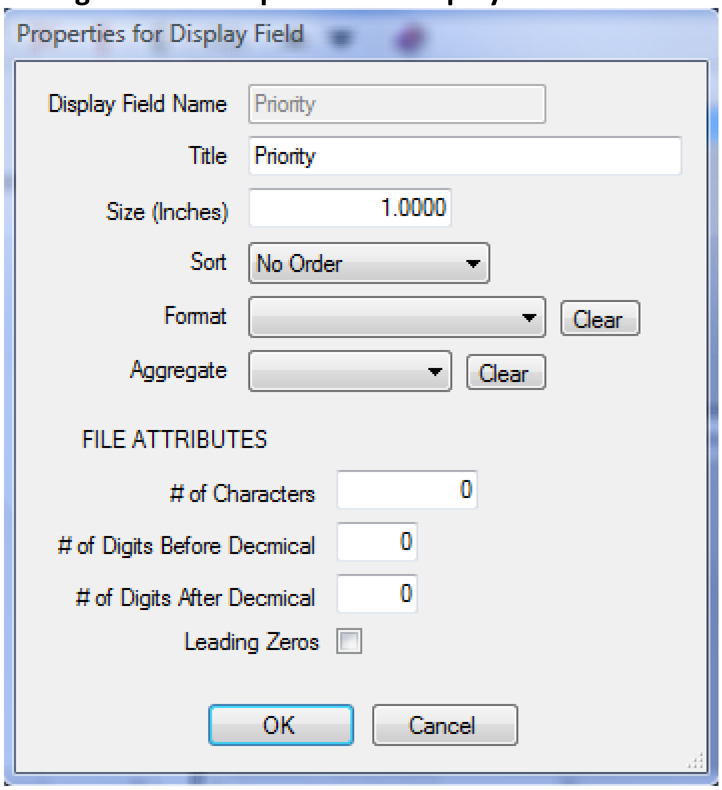
- **The Tables & Fields List**: Shows all areas that contain searchable fields.
- **The Columns List**: Displays a list of columns that will appear in your report.
- **The Filter List:** Displays the filters and fields associated with the report output.

2. Double-click a subject area in the Tables & Fields List to display all of the fields under that section. Double-click the field(s) you would like added to the Column List. Repeat as necessary.

3. Columns will appear in the order listed under the Column List. To change the order of the columns, highlight the row that you would like to move and click the Up or Down icons in the toolbar .

4. To format the columns in your report, double-click the entries displayed in the Column List. The following screen will display.

Figure 217: Properties for Display Field Screen

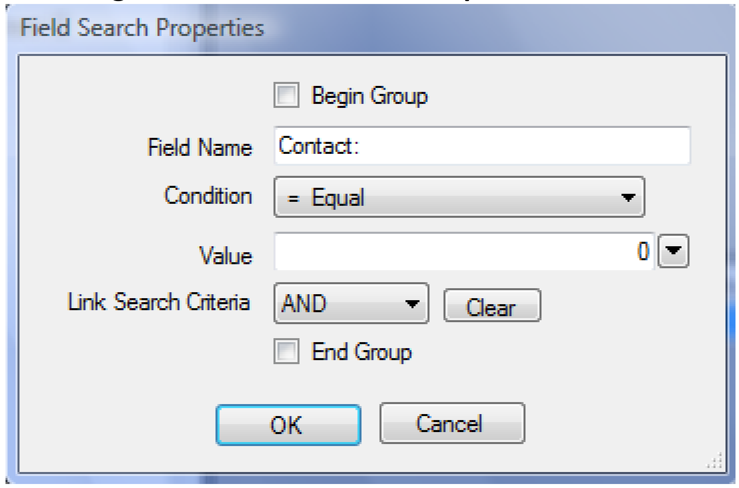


5. Change information on the **Properties for Display Field** screen as necessary. For example, to change the column heading, change the **Title** field or to have the column sorted in a particular order, make a selection under the **Sort** field. Click **OK** to save your changes.

6. To add fields to the Filter List, highlight the desired field(s) on the Field List and drag and drop it into the Filter List.

7. To apply conditions to the fields in the Filter List, double click on each entry. The following screen displays.

Figure 218: Field Search Properties Screen



8. Select the **Condition** (i.e. Equal, Less Than, Greater Than, etc.) and **Value** you would like applied to the field. In this example, you might want all Contact Types Equal to Major Clients or All Contact Types Equal to Vendors.

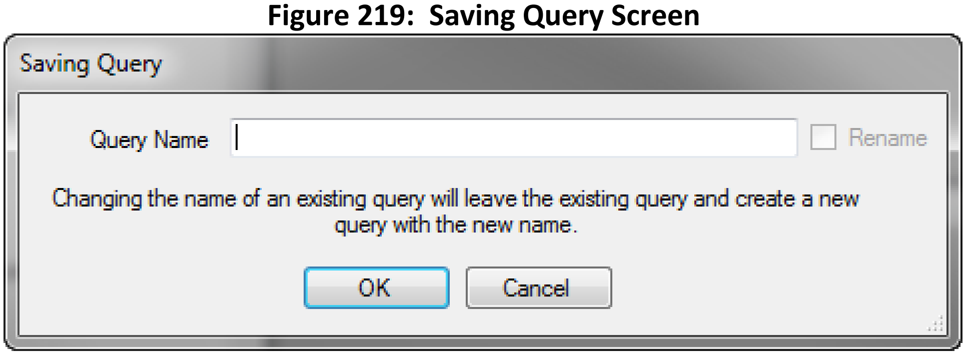
9. As in an arithmetic equation, when you combine different searches, you will need to enclose them in parentheses, which is done with the **Begin Group** and **End Group**. Therefore, if this is the beginning or end of a group of related fields, select the **Begin Group** or **End Group.** Otherwise, leave these fields blank.

10. Click **OK.**

11. Repeat Steps 6-10 as necessary to complete your equation. (For more guidance, refer to the **Named Search Examples** section.)

12. Click the **Save** icon to save the search criteria for later use.

Figure 219: Saving Query Screen

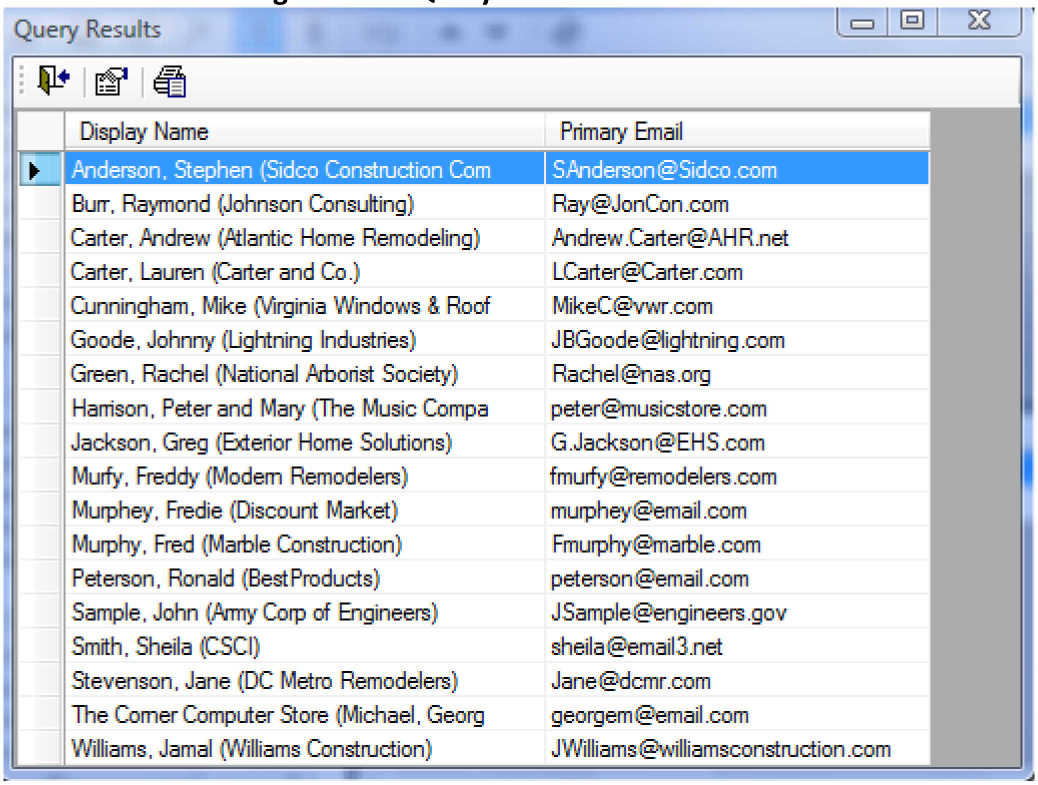


13. Type a unique name for your saved criteria. Click the **OK** button.

14. You will be returned to the **Ad Hoc Reports** screen.

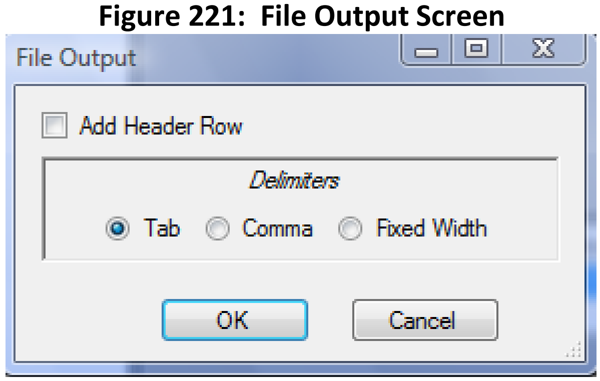
15. To run the report, click the **Run Query** icon. Your report will display in the Query Results screen.

Figure 220: Query Results Screen



16. To Export the contents of an Ad-Hoc report, click the **Save To File** icon. The following screen will display, allowing you to select the desired file format.

Figure 221: File Output Screen



17. Click **OK**. The following screen will allow you to select a name and location for the saved file (.txt file).

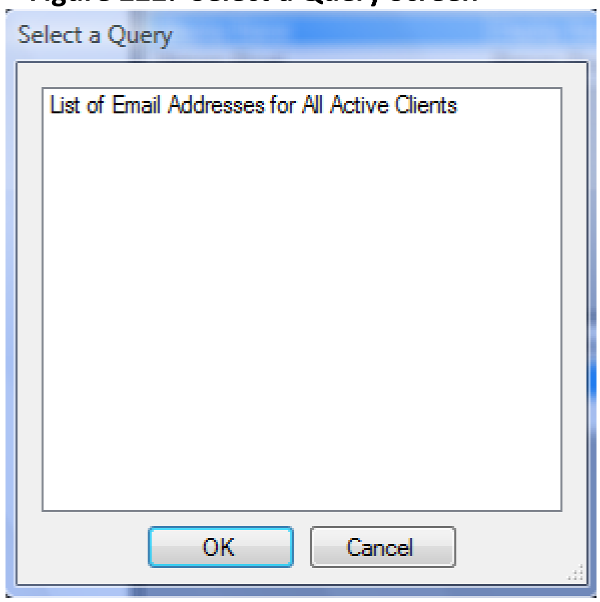
To Edit an Ad-Hoc Report

1. On the **Reports** tab, point to the module in which you would like to create a report, select **Ad-Hoc.** The following screen displays.

2. Click the folder icon  on the toolbar to access a list of previously saved queries.

3. Select the Query from the available list and click **OK**.

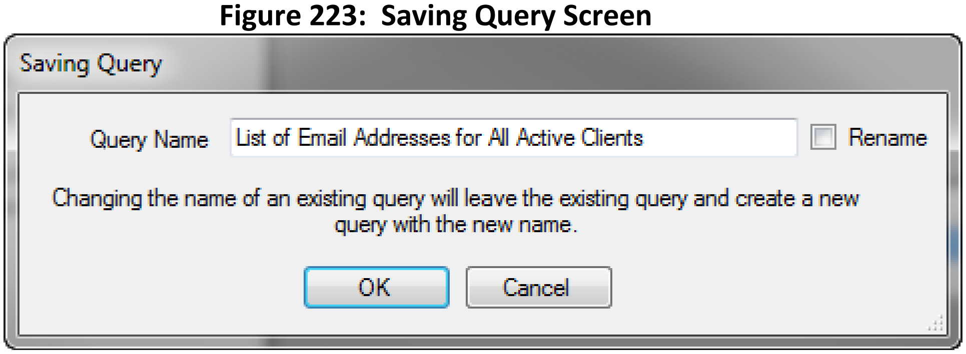
Figure 222: Select a Query Screen



4. Make necessary changes to the search criteria or column headings. (Refer to Creating an Ad-Hoc Report for instructions.)

5. Click the **Save** icon to save your changes. The following screen displays.

Figure 223: Saving Query Screen



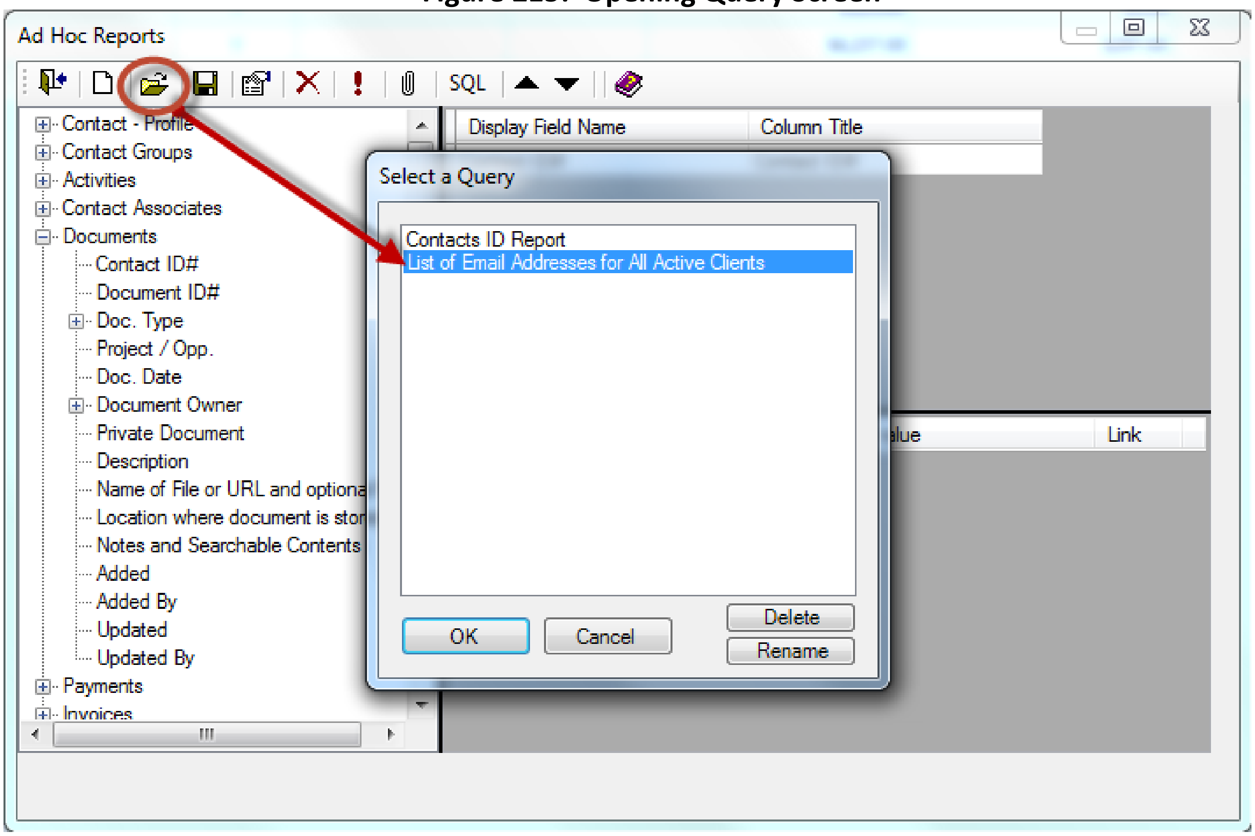
6. To save the changes, click the **OK** *OR* to create a new report with a new name, rename the search and click **OK**.

Running Existing Ad-Hoc Reports

1. On the **Reports** tab, point to the module in which you would like to create a report, select **Ad-Hoc**. The **Ad Hoc Reports** screen displays.

2. Click the **Open** (folder) icon. The **Select a Query** dialog box opens.

Figure 215: Opening Query Screen



3. Highlight the name of the desired report. To run the report, click on the **Run Query** ! icon.

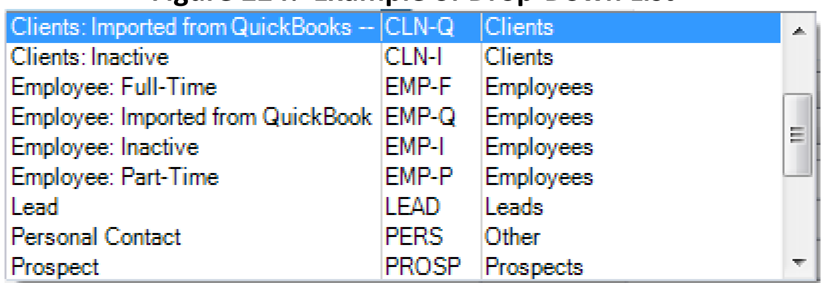
Look Up Tables

Drop-Down Overview

Throughout Results, users view drop down lists by either selecting the Drop-Down icon or Tree View icon.

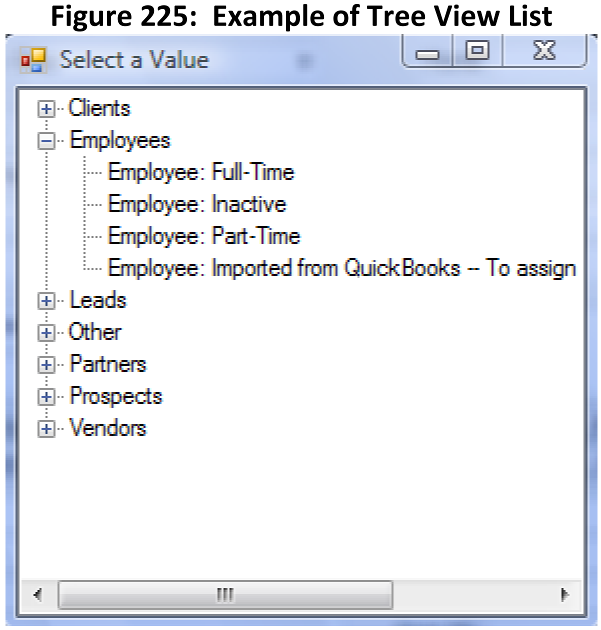
When the Drop-Down icon is selected, a list reflecting the corresponding lookup table is displayed.

Figure 224: Example of Drop-Down List



By clicking the Tree View icon **,** users see the same list grouped by various configurable categories.

Figure 225: Example of Tree View List

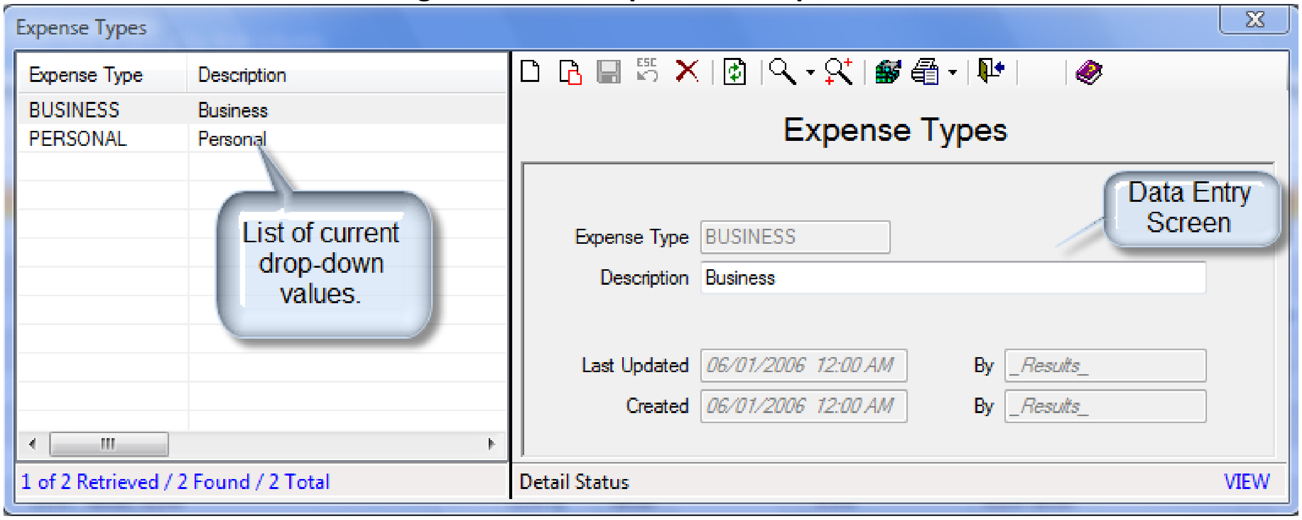


Modifying LookUp Tables

Editing a Lookup Table Entry

1. On the **Setup** tab, in the **Maintain LookUp Values** group, point to the desired module and then select LookUp Table you would like to modify**.** The following type of screen will display.

Figure 226: Example of LookUp Screen



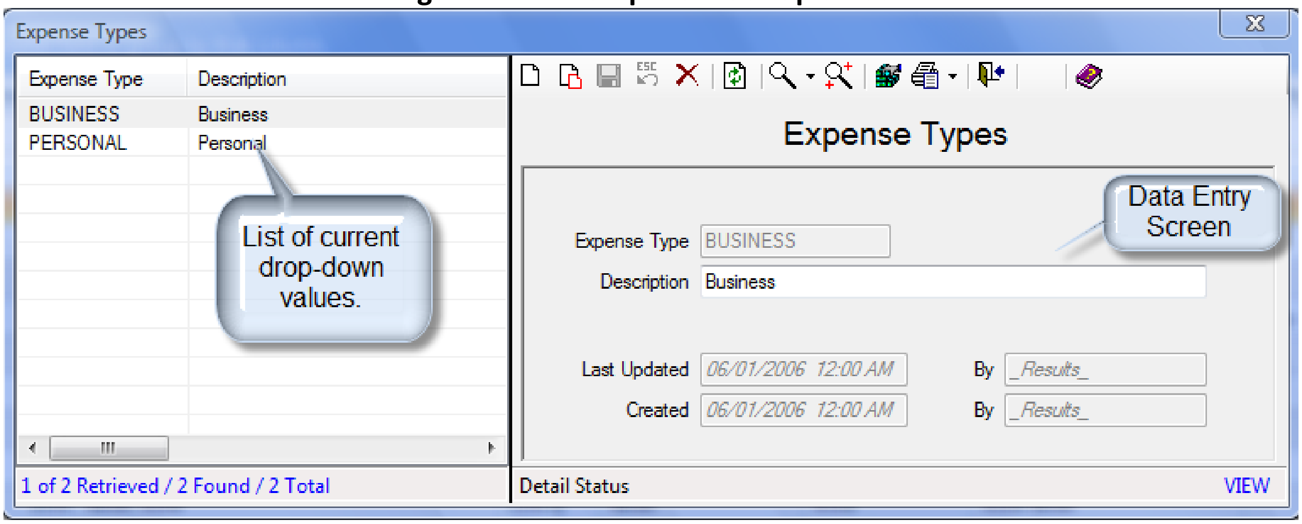
2. Select the entry you would like to edit from the list in the left grid.
3. Type the changes in the data entry form.
4. Click the **Save** icon.

Note: The code cannot be directly edited. See the sections called **Replace** and **Merge** for guidance on editing the value of the code.

Adding a Lookup Table Entry

1. On the **Setup** tab, in the **Maintain LookUp Values** group, point to the desired module and then select LookUp Table you would like to modify**.** The following type of screen will display.

Figure 227: Example of LookUp Screen



2. Click the **Add** icon.

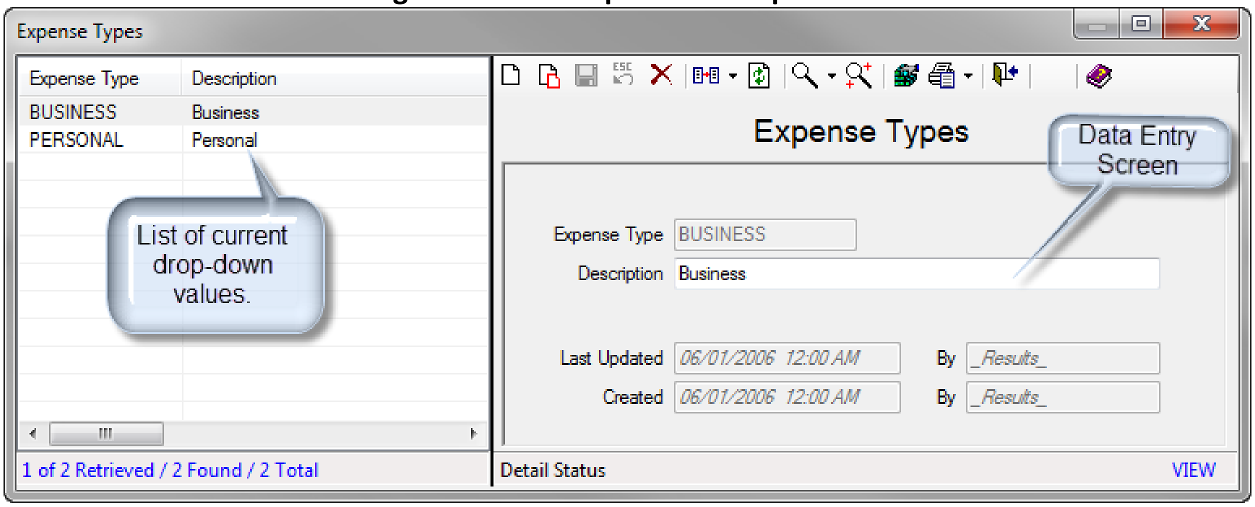
3. Fill out the information on the data entry screen.

4. Click the **Save** icon.

Deleting a Lookup Table Entry

1. On the **Setup** tab, in the **Maintain LookUp Values** group, point to the desired module and then select LookUp Table you would like to modify**.** The following type of screen will display.

Figure 228: Example of LookUp Screen



2. Select the entry you would like to delete from the list in the left grid.
3. Click the **Delete** icon.
4. A confirmation message will appear. Select **Yes** to proceed with the deletion.

Note: You cannot Delete an item that is already in use in the corresponding data entry screen. Refer to the **Replace** and **Merge** sections for guidance on renaming an existing code or merging into another item.

Replacing Code Values in Lookup Tables

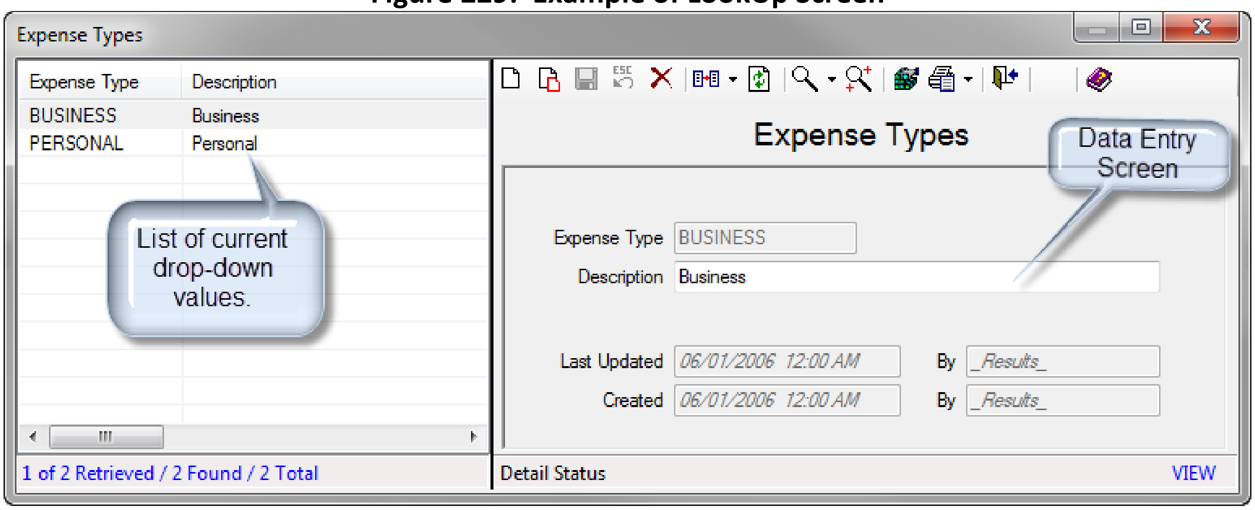
Use *Replace* to globally replace a Drop-Down code with a new Drop-Down code wherever it occurs in the Results database.

The replace feature eliminates the need to manually edit every record in a data center where the value needs to be replaced. For example, if you Replace the Contact Type "VENDR" with "VEND", every Contact record that uses the "VENDR" Contact Type will automatically have that field contents become "VEND".

To Replace a Code:

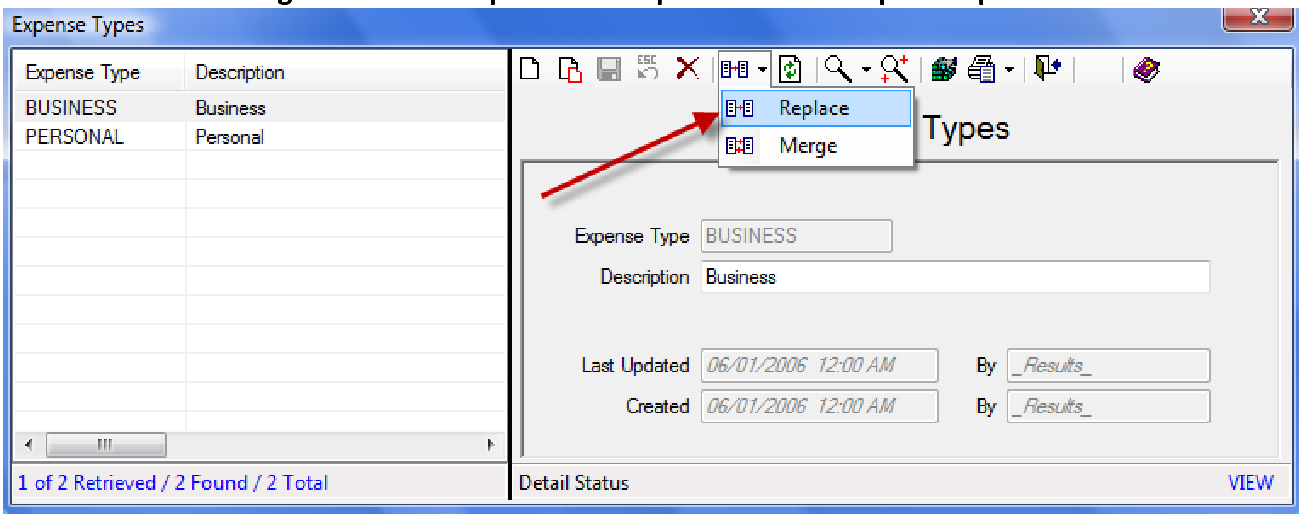
1. On the **Setup** tab, in the **Maintain LookUp Values** group, point to the desired module and then select LookUp Table you would like to modify**.** The following type of screen will display.

Figure 229: Example of LookUp Screen



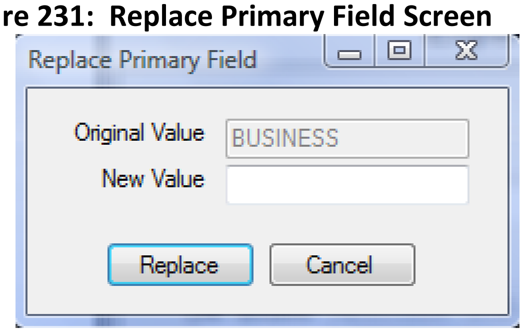
2. Select the entry you would like to edit from the list in the left grid.
3. Access the **Replace** option from the Toolbar of the data entry screen.

Figure 230: Example of LookUp Screen with Replace Option



4. Type the new code in the **New Value** field.

Figure 231: Replace Primary Field Screen



5. Click **Replace** to change the code or **Cancel** to cancel the replace.

Merging Codes on Lookup Tables

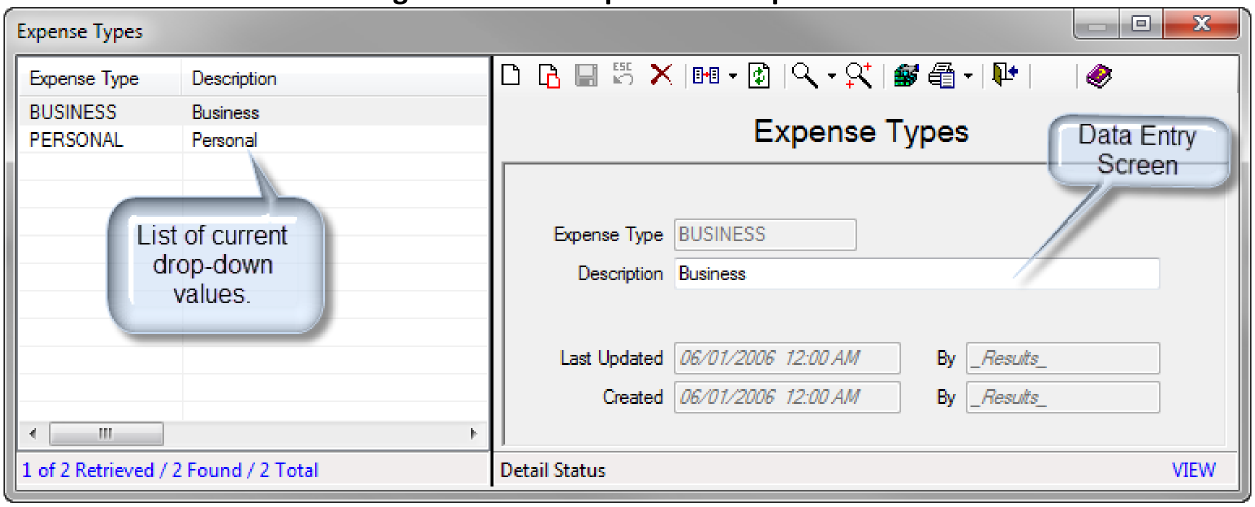
Use the Merge function to globally merge a Drop-Down code with another Drop-Down code wherever it occurs in the Results database.

The Merge feature eliminates the need to check every record in a data center for the value to be merged. For example, if some Contacts are assigned Contact Type "VENDR" and others are assigned Contact Type “VEND” yet both refer to Vendor, use the Merge function to combine these two entries.

To Merge a Code:

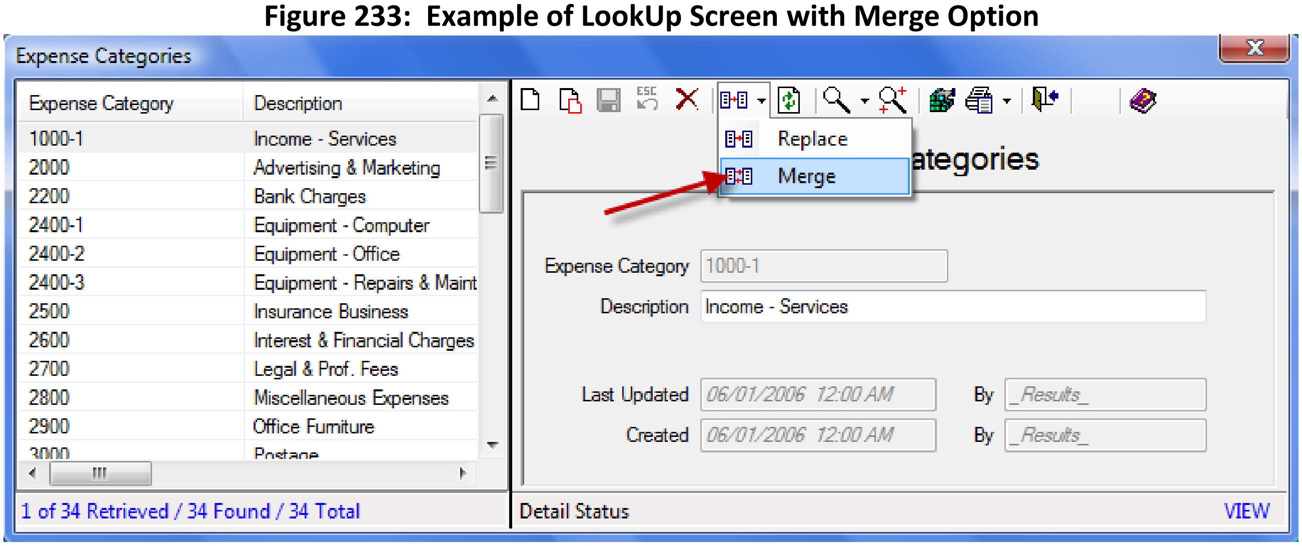
1. On the **Setup** tab, in the **Maintain LookUp Values** group, point to the desired module and then select LookUp Table you would like to modify**.** The following type of screen will display.

Figure 232: Example of LookUp Screen



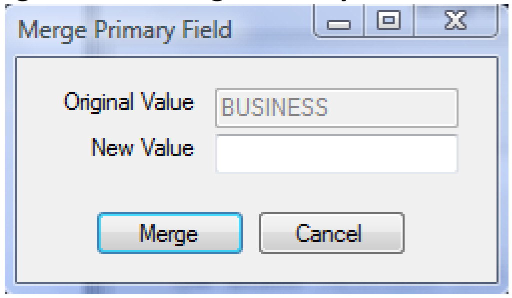
2. Select the entry you would like to edit from the list in the left grid.
3. Access the **Merge** option from the Toolbar of the data entry screen.

Figure 233: Example of LookUp Screen with Merge Option



4. Type the new code in the **New Value** field.

Figure 234: Merge Primary Field Screen



5. Click **Merge** to change the code or **Cancel** to cancel the merge.

Note: To successfully merge, the *New Value* must already exist in the list. If the *New Value* does not already exist, a message box is displayed.

Primary Lookup Tables

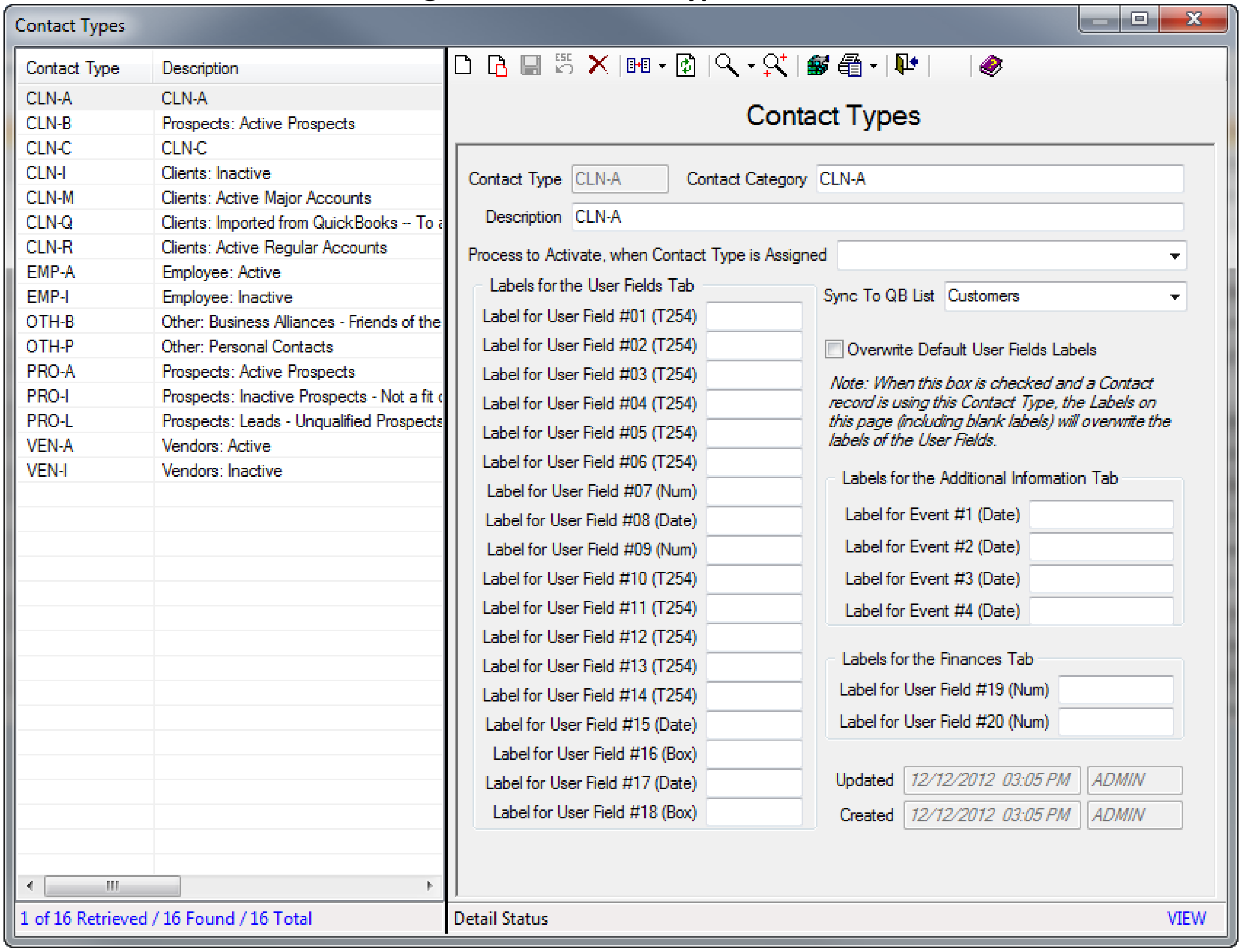
As part of deploying Results in your office, it is recommended that your Results administrator set up the following primary Lookup tables.

Contact Types

The Contact Type is a mandatory drop-down field found on the top section of the Contacts data entry screen. It is used to identify a business entity such as prospect, customer, vendor, or employee. The Contact Type makes it easy to track and report entity specific information using customized fields and processes.

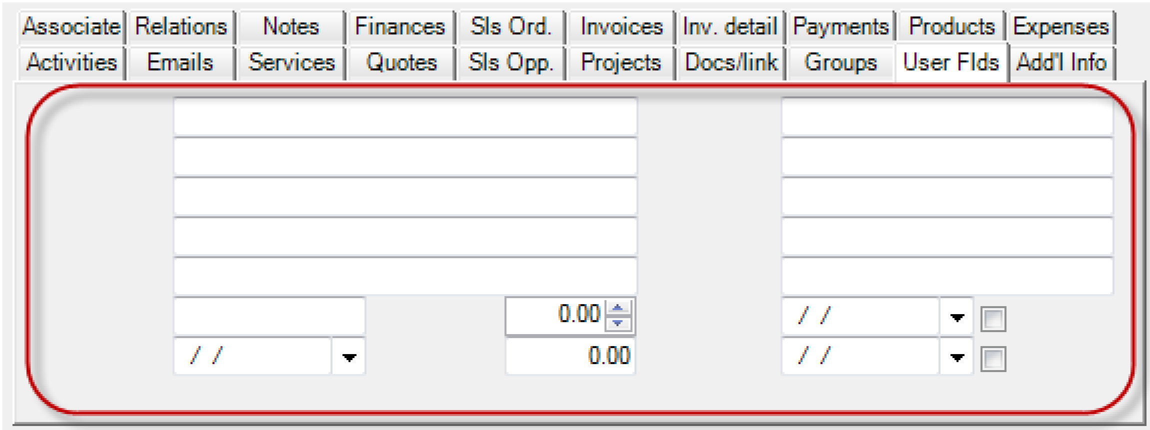
On the **Setup** tab, in the **Maintain LookUp Values** group, point to **Contacts** and then select **Contact Types.** The following screen will display.

Figure 235: Contact Types Screen



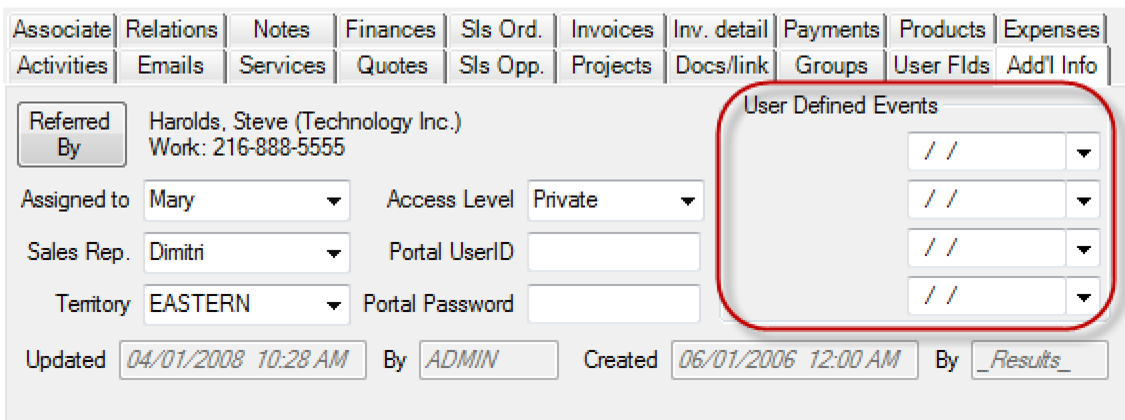
- **Contact Type**: five character code used when selecting from the Drop-Down.
- **Contact Category**: user defined category for grouping in the Tree View.
- **Description**: used to further define the purpose of the Contact Type.
- **Process to Activate**: a Drop-Down of named Processes to be activated when the Contact Type Drop-Down is changed for a Contact. Review Process Maintenance in the documentation for more information.
- **Overwrite Default User Fields Labels**: Check this box to overwrite the default labels for customizable fields on the User Fields, Add'l Info and Finances tab of the Contact data entry screen. Unless the box is checked, Results will ignore the labels on the Contact Types Maintenance form.
- **Labels for User Fields Tab**: If configured, these labels appear on the User Fields tab of the Contact screen:

Figure 236: Contacts Screen - User Fields Tab



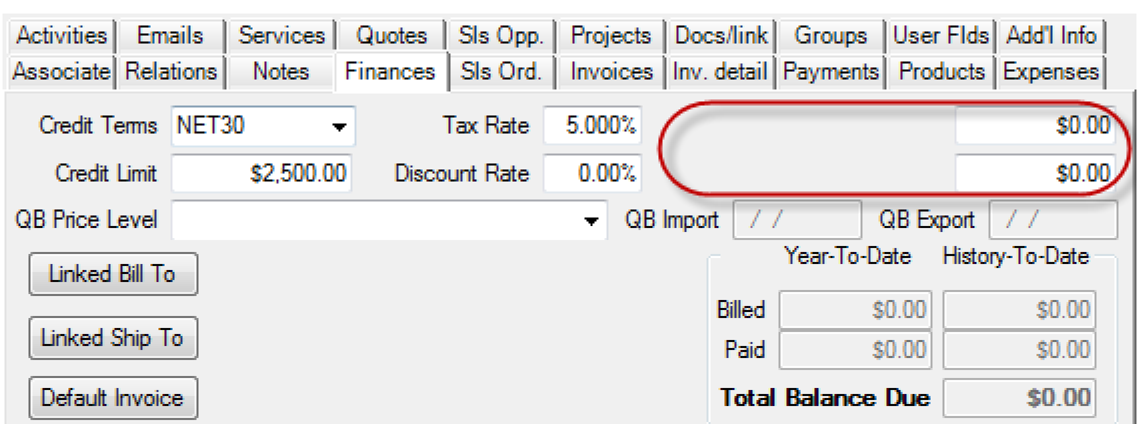
- Labels for Add'l Info (Summary) Tab: If configured, these labels appear on the Add'l Info tab of the Contact screen:

Figure 237: Contact Screen – Additional Info Tab



- Labels for Finances Tab: If configured, these labels appear on the Finances tab of the Contact screen:

Figure 238: Contact Screen – Finances Tab



Activity / Service Types

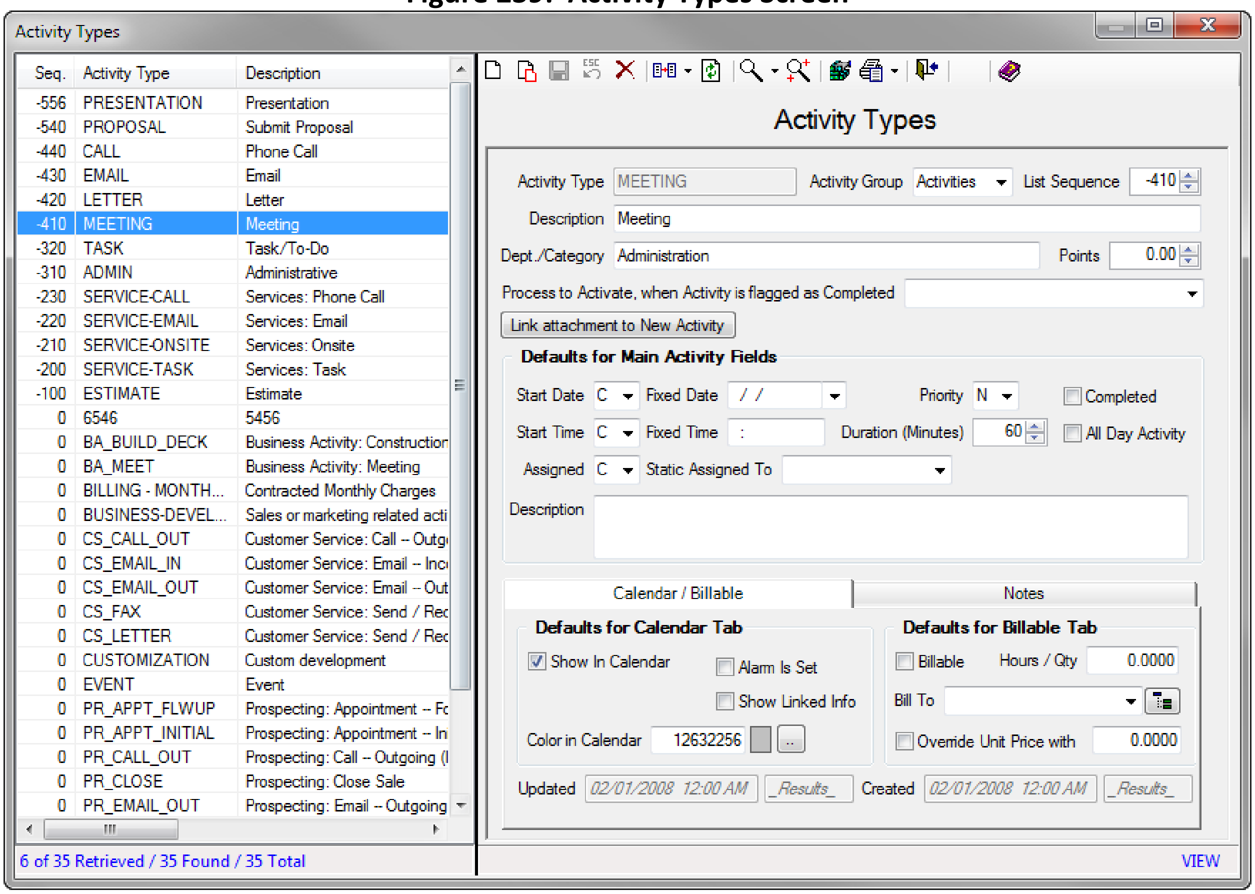
The Activity Type is a mandatory drop-down found on Activities screen. An Activity Type is used to identify a business event such as a meeting, a phone call, an email, or a mailing. The Activity Type makes it easy to track, plan and report on all business events and activities.

The Service Type is a mandatory drop-down found on Service Order screen. A Service Type is used to identify a business event that is initiated by a customer need for service such as maintenance, installation, or troubleshooting. The Service Type makes it easy to track, plan and report customer service events.

Both Activity and Service Types are configurable using the Activity Type Maintenance screen.

On the **Setup** tab, in the **Maintain LookUp Values** group, point to **Activities** and then select **Activity Types.** The following screen will display.

Figure 239: Activity Types Screen



- **Activity Type**: twenty character code used when selecting from the Drop-Down.
- **Activity Group**: select "Activities" from the Drop-Down if this code is intended to describe an activity and should appear in the Activity Type Drop-Down; select "Service Orders" from the Drop-Down if this code is intended to describe a service and should appear in the

Service Type Drop-Down.

- **List Sequence**: allows the list to be sorted in any order. Default is alphabetical by code. List Sequence to override alpha listing by Activity Type (Zero = Alphabetical)
- **Description**: used to further define the purpose of the Activity or Service order. The Description field stores multiple lines.
- **Dept./Category**: the business area for an activity record. For example, Sales, Customer Service or Technical Support are some of the business areas under which activities are grouped for reporting and analysis.
- **Points**: used to assign points to the task for purposes of calculating commission or tracking productivity.
- **Process to Activate**: upon checking *Completed* for activities of this type, automatically trigger a business process. Review Process Maintenance in the documentation for more information.
- **Link attachment to New Activity**: automatically attach a specified document to activities of this type.

Defaults for Main Activity Fields

- **Start Date**
  - **Blank Date**: do not specify a date. This is useful for reminder type activities or Tasks.
  - **Current System date**: date when the activity is added or the Calendar time slot highlighted when the activity is added.
  - **Fixed Date**: any date that you specify. For example, this is useful for scheduling quarterly inspections.
- **Fixed Date**: the specified date if "Fixed Time (Specify)" is selected from the **Start Date** dropdown.
- **Priority**: High, Normal, or Low.
- **Completed**: if checked, this Activity Type is defaults to complete.
- **Start Time:**
  - **Blank Time**: no default time specified.
  - **Current Time**: defaults to the time the activity is added or the selected Calendar time slot.
  - **Fixed Time**: defaults to the specified time. For example, this is useful for scheduling recurring activities.
- **Fixed Time**: the specified time if "Fixed Time (Specify)" is selected from the Start Time dropdown.
- **Duration**: the default number of minutes the activity lasts. In addition to the Start Date and Start Time generates the End Date and End Time.
- **All Day Activity**: indicates an all-day activity overriding Start Time & Duration.
- **Assigned**
  - **Current User**: indicates that new activities are assigned to the user that is adding

the activity.
  - **Fixed**: indicates that new activities are assigned to a specific user regardless of who adds them.
- **Static Assigned To**: the specified user for the "Fixed" assigned user.
- **Description**: free form text to minimize retyping of common descriptions.

Defaults for Calendar/Billable Tab

- Defaults for Calendar Tab
  - **Show in Calendar**: always display this Activity type in the calendar.
  - **Alarm is Set**: notify the assigned user that the activity is starting.
  - **Show Linked Info**: show linked contact, associated, attachment and project information in the calendar.
  - **Color in Calendar**: specify a color for the activity's calendar entry.

Defaults for Calendar/Billable Tab

- Defaults for Billable Tab
  - **Billable:** designate the activity as billable.
  - **Hours/Qty:** default hours or quantity to be billed.
  - **Bill To:** Drop-Down with a list of Services from the Products table with items marked as Services and not marked as Discontinued. See the Bill Codes section for additional information. A Bill code is used to establish pricing and track available units when creating a billable activity that will eventually appear on an invoice.
  - **Override Unit Price:** option to override the price in Products table.
  - **Last Updated and Last Updated By:** the date and time the record was last modified and the user who made the modification.
  - **Created and Created By:** the date and time the record was created and the user who set up the record.

Notes Tab

Specify unlimited searchable notes as part of the activity defaults. This is useful for including a checklist of items in the activity, providing a list of questions to be answered and become part of the Activity record and/or for including detailed information on the invoice for billable activities.

Other Available Lookup Tables

Several other Lookup tables are available and are used throughout the system. To modify or setup the values in other tables, follow the same process as described above.

The following list contains the names and descriptions of the other available lookup tables within Results.

Module	Lookup Table	Location	Purpose or Description
Contacts	Contact Types	Contacts	To identify a business entity such as prospect, customer, vendor, or employee.
Contacts	Associate Types	Contacts	To identify the types of Associate Contacts you would like to track.
Contacts	Sources	Contacts Sales Opportunities Projects	To identify the origin of the record. For example, a trade show might yield a list of new prospects or a new opportunity arose after a prospect visited your website.
Contacts	Territories	Contacts (Add'l Info Tab)	To define the geographical location (or similar) of a Contact record. For example, all customers in the Eastern territory may be the responsibility of a specific account manager.
Contacts	Groups	Contacts	Multipurpose code that can be utilized in a variety of ways such as analysis, providing summary counts or to group contacts for reports and target mailings. Examples include office supply vendor, computer hardware vendor, professional affiliation, type of business, SEC code, etc.
Contacts	States	Contacts Associates	To define states.
Contacts	Countries	Contacts Associates	To define the Countries where the addresses of the Contacts and Associates might be from.
Contacts	Zip Codes	Contacts Associates	By default, Results ships with the official United States Postal Service zip code list. `
Contacts	Mailing Codes	Contacts Associates	To categorize an address for mailing purposes such as international or undeliverable.
Contacts	Relation Type	Contacts	To describe a Relationship of a client in records.
Activities	Activity Types	Activities	To identify a business event such as a meeting, a phone call, an email, or a mailing. The Activity Type makes it easy to track, plan and report on all business events and activities.
Activities	Activity Status	Activities	To categorize the activities that have

			different status (i.e. Cancel, Complete, hold or progress)
Sales & Marketing	Opportunity Type	Sales Opportunity	To categorize a Sales Opportunity. For example, the opportunity might be new business or an up sell for a current account
Sales & Marketing	Opportunity Status	Sales Opportunity	To categorize the Sales Opportunity status. For example, the opportunity might be won or lost.
Sales & Marketing	Opportunity Stage	Sales Opportunity	To categorize the stage of the Sales Opportunity. For example, the opportunity might be in negotiation or finalized.
Sales & Marketing	Quote Status	Quotes	To categorize the status of a Quote. For example, the quote might be submitted or pending final approval.
Sales & Marketing	Document Types	Contact Activities Sales Opportunities Projects	To categorize the document types that might be linked to a contact record or project. For example, Proposal, Contract, Letter etc.
Services & Projects	Project Type	Project	To categorize a Project. For example, the project might be a marketing campaign or a new customer installation.
Services & Projects	Project Status	Project	To categorize the Project status. For example, the project might be initiated or complete.
Services & Projects	Project Stage	Project	To categorize the stage of the Project. For example, the project might be in Phase I or finalized.
Finances	Invoice Terms	Invoices Quotes	To provide a list of invoice and quote payment terms.
Finances	Payment Types	Invoices Payments	To provide a list of payment types. For example, check or Visa.
Finances	Class Codes	Invoices Quotes Sales Order	To provide a list of Class Codes that will integrate with QuickBooks.

Finances	VAT Codes	Products Quotes Sales Orders Contacts Invoices	To provide a list of VAT (Value Add Tax) Codes. Note: This is only intended for the UK Version of Results.
Finances	Product Lines	Products Quotes Invoices	To categorize the different types of products into similar groups.
Finances	Product Locations	Products Quotes Invoices	Physical location of where a specific product is stored. This is used for effective inventory tracking.
Finances	Expense Categories	Expenses	To group similar expenses. For example travel, meals or office supplies.
Finances	Expense Types	Expenses	To categorize the expense types. For example, business or personal.
Finances	Wage Types	Projects Timesheets	To categorize the type of Wages being tracked.

